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Institutional legitimacy in international schools: An exploration of school leaders' perceptions of institutional legitimacy in U.S. style international schools in Latin America.

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Ruth Allen

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Dedication

To my parents who have been a source of encouragement and inspiration my whole life.

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To my husband, Rafael whose unwavering belief that this would be possible, was probably what made it happen.

To my daughters, Sofia and Daniella. You are what makes all of this meaningful.

This is for you.

Abstract

The concept of institutional legitimacy is critical to both international schools and international school leaders. For a school to thrive, school leaders must recognise the factors that distinguish a 'legitimate' institution from one whose legitimacy might be questioned. This study uses Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools to frame an analysis of school leaders' perceptions of institutional legitimacy. The study aims to identify factors that might influence school leaders' perceptions and to contribute to an understanding of institutional legitimacy within the context of U.S. style international schools in Latin America.

The study uses a qualitative research method to explore the attitudes, perceptions and beliefs of school leaders, and to uncover emerging themes and patterns. One of the most noteworthy findings is the extent to which the cognitive schemata and heuristics of the participants influence perceptions of legitimacy at all levels. The study concludes that while school leaders may seek to establish and manage legitimacy from a rational perspective, they must also be cognizant of the multifaceted perspectives and cognitive biases of stakeholders if those stakeholders are to be assimilated effectively into the organisation.

Key Terms: Institutionalisation; Legitimacy; Institutional Primary Task; Pillars of institutionalisation; Leadership; International school; Hermeneutic Phenomenology;

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CHAPTER 1: INTRODUCTION

1.1 Background

According to Deephouse et al (2017), legitimacy is fundamental to organisations in that "it influences how organisations behave and has been shown to affect their performance and survival" (p.27). An organisation that is judged legitimate by its stakeholders is likely to prosper, but one that is judged illegitimate may very well fail to engage stakeholders and, as a consequence, "cease to exist" (ibid:33). Bunnell et al (2016b) indicate that while institutional legitimacy is important for all schools, it is crucial to the survival and success of international schools and "critically important" (p.409) for the students and teachers within them. They indicate that in order to establish institutional legitimacy, it is incumbent upon those responsible for leadership and governance to have a "sound and cogent understanding" (p.414) of the demands of the external environment and to ensure that institutional practices and procedures within the schools are aligned with those demands. However, they also indicate that establishing such alignment and understanding can be a difficult process given the "complex multiple institutional logics" (ibid) at play within the international school sector.

Bunnell (2018) describes international schools as being characterised by "numerous dualities of expectations and behaviour all contained within a largely precarious and isolated environment" (p.552). These dualities, or even multiplicities, may be manifest in various aspects of a school including stakeholder demographics, curriculum, organisational structure and leadership and represent a challenge for international schools in that there can be few shared assumptions upon which judgments of legitimacy can be based. The reference to a "largely precarious and isolated environment" (ibid) suggests that international schools may also be subject to rapid change and, as independent organisations, devoid of the structure and support provided by an established national system. Lacking this structure and support, the institutional legitimacy of international schools may be comparatively fragile and vulnerable to a wide range of threats (Caffyn 2018). An understanding of the factors that influence judgments of legitimacy in general and of legitimate claims to be international in particular would, therefore, seem to be of paramount importance, particularly for those who are in positions of leadership and responsible for implementing the systems and strategies that may strengthen institutional legitimacy and ensure the success and survival of their schools.

In terms of personal interest, my experience in a number of international schools in Latin America was central to the identification of institutional legitimacy in international schools as a subject for study. In 1997, I accepted my first post based upon the fact that the school was authorized by the International Baccalaureate Organization (IBO). I assumed the IBO 'stamp of approval' was an indicator of institutional legitimacy and, in many respects, this was, indeed, the case. The IB Diploma Programme provided clarity in terms of curriculum and ensured that teaching assignments were similar to those I had experienced in the UK. Nonetheless, there were aspects of the experience that undermined my own and others' perceptions of the school as a legitimate organisation and, in particular, as an employer. For example, not all teachers employed by the school were qualified according to UK or host country requirements. Indeed, it seemed that a number of expatriates were employed as a matter of convenience, being native speakers of English who happened to live in (or even be passing through) the city. In addition, there was a sense of precarity in terms of the management of human resources. Work contracts would frequently go unsigned and there was a perceived lack of transparency regarding contract renewals and/or terminations. Added to this, colleagues with experience teaching in international schools in regions such as Asia or the Middle East would question the legitimacy of the school's claim to be international based upon the fact that over 80% of the student population was drawn from local families. A number of these teachers would also make disparaging comments about the school being a glorified social club, claiming that a low student work ethic, coupled with a high level of parental influence meant teachers were unable to employ a rigorous learning process.

I then moved to a school that was owned by a multi-national corporation and was exclusive to the children of company employees. Here, the company provided oversight of administrative matters and ensured, for example, that all employment regulations were strictly adhered to and all staff were appropriately qualified. As a result, the school´s legitimacy as an employer was rarely questioned. The school was also accredited by the U.S. based Southern Association of Schools and Colleges (SACS), and was a member of the Association of Colombian and Caribbean American Schools (ACCAS). Both of these factors contributed to a sense of legitimacy in terms of the school's claim to be an American international school despite the fact that, once again, the student body was made up of a majority of Colombian students. However, in terms of teaching and learning, the school did not have an established curriculum and little in the way of a coherent pedagogical approach. Subsequently, teaching and learning at the school was not 'institutionalised' but rather dependent upon individual teachers. This put the legitimacy

of the school at risk as it resulted in a significant amount of instability. In particular, inexperienced teachers or those new to the school could find themselves in an uncertain situation with few guidelines to follow, while experienced teachers could come and go, taking their 'curriculum' with them. In order to consolidate legitimacy in this area, a decision was taken to implement the IBO continuum of programmes throughout the school.

During my tenure at the school, I was offered, and subsequently assumed the role of 'School Director'. This was the most senior leadership position in the school, overseeing both the administrative and academic aspects of school operations. As School Director, I reported directly to the board and supervised each of the principals who led the elementary, middle and high school sections of the school. I also supervised the business manager, who managed aspects of the organisation such infrastructure, maintenance and finance. It was clear that in assuming this role, I was also assuming responsibility for consolidating perceptions of the school's institutional legitimacy. I was answerable to the board for the execution of strategic decisions and for ensuring that all operational activities were 'legitimate' in terms of being in line with the school's mission and purpose. In the eyes of teachers, parents and students, my role as School Director was recognised as the position with the most authority within the school and as such, was a representative of the school and its values and responsible for the legitimacy of both. In the eyes of the local authorities, the School Director (or ´Rector' in Spanish) was the individual who was held accountable for the implementation of Ministry of Education requirements.

After 10 years in this role, I moved to another American international school, which is where I was employed during the course of this study. In contrast to the previous school, this particular school was established as a parent corporation and was more explicitly 'American' in a number of ways. Both the U.S. and the Colombian flag were flown at the entrance to the school and both the U.S. and the Colombian national anthems played at school assemblies and events. The curriculum was based on U.S. standards and, while it did not have a single, overarching pedagogical framework such as that provided by the IBO, various programmes were implemented with a view to ensuring a coherent pedagogical approach. These included the Advanced Placement (AP) Programs offered by the U.S. based College Board. Similar to my previous school, this particular school was also accredited by the Southern Association of Schools and Colleges (SACS), and was a member of both the Association of Colombian and Caribbean American Schools (ACCAS) and the Association of American Schools in South America (AASSA). These factors, together with the fact that approximately 50% of the teaching

staff were from the U.S. or Canada, again lent legitimacy to the school's claim to be an American international school. Despite the fact that my official title in the school was that of 'Superintendent', my role was very similar to the one I had in my previous school. I reported directly to the school board and supervised the four section principals (preschool, elementary, middle and high), director of teaching and learning (responsible for the development of curriculum and pedagogical practice) and business manager. I was also the person accountable to the Ministry of Education for the implementation of all governmental regulations.

While the school enjoyed a positive reputation at both a national and international level, threats to its legitimacy as an international school existed from a number of different vantage points. Firstly, the publication of league tables based on student performance on national standardized tests frequently resulted in pressures to review the curriculum and focus on local requirements rather than U.S. standards. Secondly, while the school was run as a non-profit organization and the financial management confirmed as legitimate through external auditing processes, comparisons by some teachers to the more lucrative finances of other international schools in regions such as Asia and the Middle East, meant that legitimacy could be questioned in terms of how teachers were remunerated. Once again, colleagues with experience teaching in international schools in Asia or the Middle East questioned the legitimacy of the school's claim to be international referencing the fact that over 95% of the student population were Colombian. Underlying all of this was the fact that the school was also characterised by "numerous dualities of expectations and behavior" (Bunnell 2018:552). The local and expatriate teaching staff brought culturally diverse expectations to bear upon the organisation, with locals and expatriates often prioritizing different aspects of teaching and learning. For parents, expectations of the school varied between seeing the acquisition of English, the possibility of access to an international university, and/or the development of global citizenship as a priority for their children. Navigating through these dualities and finding a path that promoted perceptions of legitimacy from the viewpoint of all stakeholders presented a significant challenge and it was this that led to the current study and its aim to contribute towards an understanding of the factors that influence perceptions of institutional legitimacy in international schools. Recognising that it is the particular responsibility of school leaders to consolidate perceptions of legitimacy, the study will explore school leaders' perceptions of institutional legitimacy in the specific context of U.S. style international schools in Latin America.

The following sections provide further context for the study. Section 1.2 provides a definition of school leadership positions for the purpose of this study and identifies the role of 'School Head'

as the focus of the study. Section 1.3 provides an overview of the Latin American context and Section 1.4 sets out the criteria by which schools were identified as U.S. style international schools within this context.

1.2 Definition of school leaders.

Gray and Summers (2016) describe how the leadership structure of private international schools in South America is often based on a structure similar to that which I have described as being typical of my own experience. Each of the schools in their study was organised into preschool, elementary, middle and high school sections with a principal assigned to each grade section and an individual 'school director' (p.7) managing the institution from a whole-school perspective. Keller (2015) also indicates that most international schools have a "single person in a top leadership position" (p.902) but goes on to recognize that the job titles used for these roles can vary greatly including: "Director, Director General, Education Director, Executive Director, Head, Head of School, Headmaster, Principal, President, School Head, and more" (ibid). It is this "single person in a top leadership position" (ibid) that is the focus of the current study as it is the person in this role who is most able to see the "big picture" (Mahfouz 2019:410) and who is ultimately responsible for ensuring the institutional legitimacy of the school from both an academic and administrative point of view.

In recent conversations hosted by the Association for the Advancement of International Education (AAIE), a distinction was made between 'School Heads' and 'Senior Leaders', with the term 'School Head' being used to refer to the individual that holds the top leadership position in an international school. The term 'Senior Leaders' was reserved to refer to a variety of other positions, including the principals of each level of the school, curriculum coordinators/directors and business managers. For this reason and for the purpose of the current study, the individual in the top leadership position of an international school will be referred to as the 'school head' while the term 'school leaders' will be used to refer to the group of people in a school who might collectively represent leadership. Figure 1. Provides an illustrative example of an organizational structure that identifies the role of the school head, its place within the structure of a school and its relationship with the school board and other 'school leaders'.

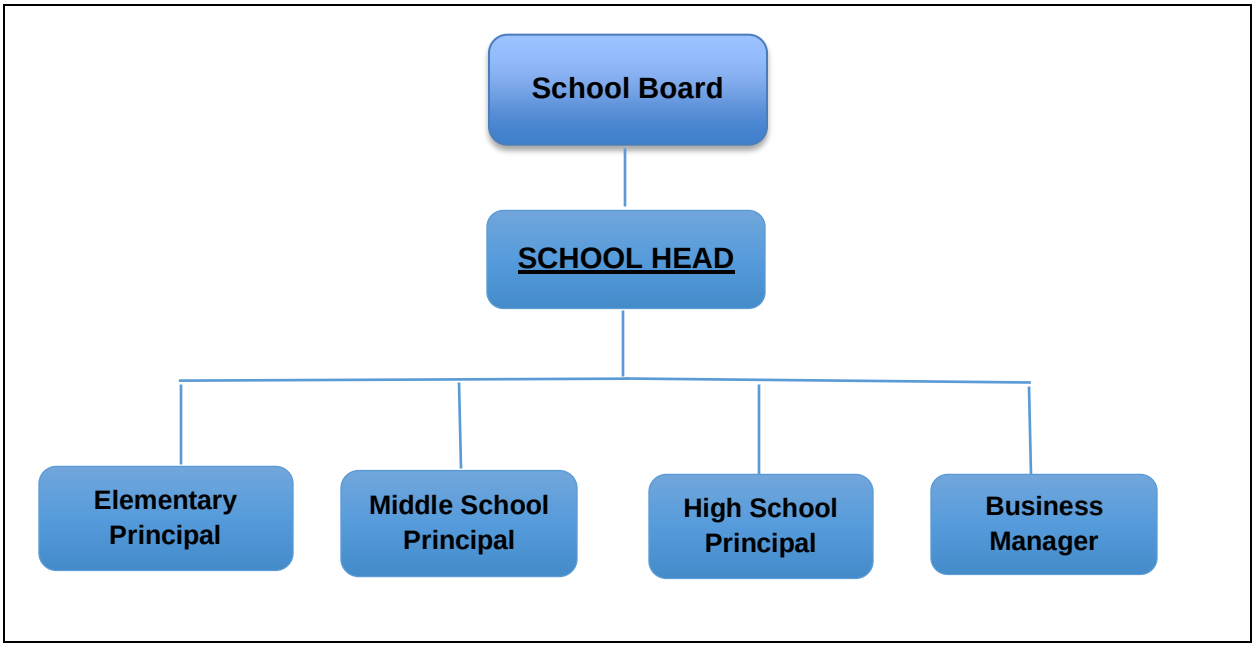

Figure 1: Organisational structure of a school indicating the position of the School Head as defined in the current study.

1.3 Overview of the Latin American Context

The exponential growth of the international school sector in global terms has been well documented in a number of studies (Hayden and Thompson 2010; Bunnell et al 2016b, 2017b; Bunnell and Fertig 2016; Bunnell 2014, 2016, 2018, 2019, Mahfouz et al 2019). According to ISC Research (2020), the market has grown 349% in the last 20 years, from 2,584 international schools in 2000 to more than 11,616 in July 2020 (p.1). As a result, the international sector is one that can no longer be considered “on the eccentric fringes” of the educational world (Bunnell 2018:562), but one that merits study. The concept of the institutional legitimacy of international schools is subsequently significant for all stakeholders. The international school sector in Latin America has been no stranger to this growth and the dearth of research in the region, not only in terms of education but also, in terms of research in any area (Flessa et al 2018) means that it is a region that deserves more attention. The following paragraphs provide context regarding the characteristics of the region.

Flessa et al (2018) refer to the Latin American region as one that struggles with the legacies of colonial rule and one in which wealth is concentrated in the hands of a few with high levels of poverty among the majority. This lack of equality is reflected in a "bifurcated education system with private elite schools catering to the wealthy classes and to middle-classes seeking higher mobility, and public schools serving mostly poor children" (Stromquist 2006:975). According to a recent report from the Inter-American Development Bank (Elequa et al 2018), this division is increasing, with education in Latin America presenting the "greatest private sector participation and expansion in the world" (Ibid: 4). Elequa et al (2018) identify three potential explanations for this trend: the growth of the middle class, a lack of state capacity, and government policies that foster the growth of the private sector. However, their research does not distinguish between 'national' and 'international' private schools.

With more specific reference to the international school sector in Latin America, Bunnell (2019) indicates that the region is undergoing significant development involving a rising middle class and the continued evolution of a variety of "Globalised English Medium of Instruction Schools" (GEMIS) (Bunnell 2019:108). GEMIS, according to Bunnell (2019) are schools that have "a global outlook located mainly outside an English-speaking country delivering a non-national curriculum at least partly in English" (p.1), a definition which is similar to that used by the organisation ISC Research (2017) to define an 'international school'. For ISC Research (2017), an international school is one that "delivers a curriculum to any combination of pre-school, primary or secondary students, wholly or partly in the English language outside an English speaking country" (p 3). According to a presentation by ISC Research at the 2017 conference for Latin American schools hosted by the accreditation organization AdvancED (now Cognia), there were 1,149 international schools in Latin America, representing an increase of 11.5% on the previous year. Of these, 175 schools (15%) were U.S. style international schools in the sense that they were accredited by AdvancEd, which, while it is not the only U.S. based accreditation organization in the region, is certainly one of the largest (ISC 2017). Section (1.4) will further explore the concept of U.S. style international schools in Latin America and define the criteria by which schools were identified as potential participants for the current study.

1.4 Definition of US style international schools in Latin America

In order to establish a definition of U.S. style international schools it is important to note that the adjective 'American' is often used to refer only to the characteristics of North American culture while it does, in fact, refer to the continent of the Americas as a whole. A clear distinction must therefore be made between the United States of America and Central and South or Latin America. For the purpose of this study, reference will be made to U.S. style rather than American-ethos international schools.

Mahfouz et al (2019) describe U.S. international schools overseas as being supported by government agencies (such as the Office for Overseas Schools from the U.S Department of State), parental groups and private businesses with the purpose of supporting both U.S. expatriates and local students in overseas locations. According to Mahfouz et al (2019), students in these schools follow a programme that is built, at least in part, on U.S. curriculum and U.S. standards as it is expected that they will return to the U.S. or continue their education in another similar school. Indeed, many U.S. schools are accredited by U.S. based accreditation organisations such as those incorporated by Cognia that allow them to issue a U.S. High School Diploma despite being based overseas. The emphasis on U.S. accreditation is significant, not only because it means that the school is 'quality assured' but also because, unlike publicly funded schools in the region, where "most important decisions are made by a national Ministry of Education" (Flessa et al 2018:194) and where school heads "are primarily a bureaucratic middle manager, implementing decisions made by others" (ibid), the governing bodies of privately funded U.S. style international schools in Latin America are expected to retain "primary responsibility for the establishment and implementation of policies and practices that lead to the effective operations of the institution" (Cognia 2019:4). As a result, the school heads of U.S. style international schools in Latin America have a level of autonomy that is greater than that of their counterparts in publicly funded schools and an accompanying responsibility to act as both an administrative, and an instructional leader. As such, their impact upon institutional legitimacy can be significant.

While many U.S. style international schools in Latin America have a direct link to the U.S., either through accreditation or membership of an organisation such as the Association of American Schools in South America (AASSA) or the Tri-Association of Schools of American schools in Mexico, Central America, Colombia and the Caribbean, many also have a culture that could be

described as blended with that of the 'host' nation. Indeed, as far back as 1955, Fitzgerald (1955) referred to 'American' schools in Latin America as being established "by Latin Americans and North Americans alike, for the additional purpose of improving mutual comprehension and respect for the language and way of life of others (p.337). Here, the focus on "mutual comprehension" suggests a bicultural approach, while the emphasis on language highlights the bilingual nature of many U.S. style international schools in Latin America (Fitzgerald 1955; De Mejia 2002, De Mejia 2011; 2013; Bettney 2020). This emphasis suggests that being bicultural and bilingual are significant characteristics of U.S. style international schools, a fact that is reflected in the profiles of the teaching staff. According to data from IRC Research (2017), 38% of the teachers in AdvancEd schools in Latin America were identified as expatriate with the great majority (35%) coming from North America. However, these same expectations were not apparent with reference to the student population. Indeed, according to the data from ISC research (2017), 83% of the students in the same schools were students from the host country with only 17% from North America.

For the purposes of this study, schools were therefore considered U.S. style international schools if they complied with the following criteria:

1. The school offers a bilingual programme with a curriculum based, at least in part, on U.S. standards.
2. The school is accredited by a U.S. based accreditation organization and is authorized to issue a U.S. High School Diploma.
3. The school employs both local and expatriate (including North American) teachers.
4. The school admits both local and expatriate students.
5. The school is a member of a U.S. based professional association such as AASSA or the Tri Association of American Schools in Mexico, Central America, Colombia and the Caribbean.

1.5 Significance of the study

This section explores the significance of the current study in terms of its importance for key stakeholders. It indicates how an exploration of institutional legitimacy may be important for teachers, students and parents and concludes with a reflection on why the study is of particular importance for those individuals who hold the position of 'school head'.

ISC Research (2020) indicates that the number of full time staff employed in international schools has also grown at an exponential rate, moving from 90,000 teachers employed in 2000, to 554,000 in 2020, an increase of 529% (p.1). Bailey (2015) indicates that many teachers choose to work internationally because they wish to leave a national context that has caused an "erosion of their pleasure in teaching" (p.5), and hope to renew their skills and rediscover their professional identity in the international context. However, Bunnell et al (2017a) note that for this "(re)-formation" to occur, teachers must be in a school that has "a clear identity as a legitimate institution and a clear sense of its institutional primary task" (p.16). Unfortunately, this is not guaranteed in a field that remains, as Bunnell (2016) describes, "largely unregulated, uninspected, unaccredited, unrecognised and under-researched" (p.547). Indeed, results published in the 2018 ISC research report, indicate that although systems of regulation, inspection and accreditation including the International Baccalaureate (IB) and a variety of European or US based accrediting agencies do exist, only 21.9% of schools in the entire international schools market are currently accredited (p.2). As a result, instead of consolidating their professional identity, teachers moving into international schools may find themselves in a "precarious situation with considerable risks and pitfalls" (Bunnell 2016:545).

Perceived legitimacy from the perspective of parents is also vital in a context where the majority of schools rely wholly on tuition fees for their income and where there is "active engagement in school choice among parents" (Bunnell et al 2016b: 409). Indeed, an increasing number of international schools no longer rely upon a 'captive' population of expatriate families but depend upon local families who may be making a significant financial investment in order to gain a sense of "distinction and access to social capital accumulation"(Bunnell 2019:146). Unlike expatriate families who may be limited to schools that have direct links to their home countries, these local families, whose children make up approximately 80% of the student population in international schools (Bunnell and Fertig 2020) are much more likely to see possibilities in a greater range of schools, including those with a national perspective. A legitimate reputation is therefore critical in what is undoubtedly an increasingly competitive environment.

The concept of legitimacy is also important for students. Erickson (1987) indicates that the perception of a school as legitimate is important if students are to "assent to the exercise of authority" (p.344). He also observes that perceptions of legitimacy can impact upon student motivation and engagement, particularly in terms of the cultural relevance of the programme and the clarity and consistency of instruction. In instrumental terms, institutional legitimacy

would also seem to be important for students particularly if, as is the case in U.S. style international schools, the school is to issue a 'High School Diploma' that may be used to access Higher Education.

While the perceptions of teachers, parents and students are important, the responsibility for establishing and maintaining institutional legitimacy falls squarely on the shoulders of school leaders in general and school heads in particular. As a result, it would seem vital that school heads not only understand, but also identify ways to be intentional in the establishment and consolidation of legitimacy. Indeed, it could be argued that the establishment of institutional legitimacy has both a personal and a professional benefit for school heads in that the more legitimate the organisation, the more likely it is that any 'mistakes' will be seen as atypical and uncharacteristic. As a result, school heads in legitimate institutions are able see challenging situations as opportunities to learn rather than as threats to their authority and, ultimately, their continuity in the role.

While some research has been undertaken to explore the impact of institutionalisation on teachers within the international school sector (Bunnell et al 2017a), there has been little research that focuses on international school leadership and the factors that might influence judgments of institutional legitimacy at the level of the school head (Bunnell 2019b). Flessa et al (2018) also note that there has been little research into school leadership in the context of Latin America in general. This is surprising considering that it is school heads who are generally charged with establishing and maintaining institutional legitimacy, and with whom the legitimacy of an institution may rise or fall. A knowledge of the factors that influence school heads' perceptions of legitimacy, not only at concrete, tangible level, but also at the level of "deeper belief systems" (Bunnell et al 2017a:17) would, therefore, seem to be important.

1.6 Rationale of the study

Bunnell (2019a) notes that the current "proliferation of schools either being identified as, or claiming to be, 'International' has led to a cynical narrative, sometimes directly questioning the legitimacy of some institutions"(p.2). Indeed, Bunnell (2019) describes the appearance of a "large underbelly of 'non premium' schools" (p.6) where the word "underbelly" suggests not only a lack of quality, but also a side to the international school sector that is out of sight and

potentially unscrupulous (Poole 2020). In terms of Latin America, Elequa et al (2018) suggest that the whole region is out of sight in the sense that there is “scant information” about private schools in general. Bunnell (2019) also acknowledges that little attention has been given to international schools in the region; however, he also suggests that the field of U.S. style international schools is “small but well-established”. This combination of a lack of information together with the fact that many U.S. style international schools are well established, suggests that U.S. style international schools in Latin America may represent an important untapped source of information.

According to Bunnell et al (2017b), the systems and strategies needed to establish legitimacy are created through a process of institutionalisation. Scott (2003,2014), provides a framework for understanding this process of institutionalisation, arguing that institutions such as schools are social structures, composed of cultural-cognitive, normative and regulative elements that work together to support and provide stability, meaning and structure to social life (Scott 2003). Extending Scott’s theories of institutionalisation, Bunnell et al (2017b) state that in order for an organisation to be considered a legitimate institution, the pillars of institutionalisation must be underpinned by a legitimate “institutional primary task” (p.7) and argue that the pillars must be aligned with a ‘primary task’ that is of value or ‘legitimate’ in terms of the vision and purpose of the institution. Bunnell et al (2017b) conclude that the legitimacy of a school’s claim to be international relies on the delivery of an international curriculum as its institutional primary task and identify the IB Diploma programme as one such curriculum. It would therefore seem important to extend research in this area to include schools that offer alternatives to the IBDP such as those that are based on the U.S. Common Core and programmes such as the AP.

In order to foreground the challenges international schools must address in establishing legitimacy, Bunnell et al (2017b) develop an analytical framework for theorising the process of institutionalisation in international schools that is based on both Scott’s (2003) pillars of institutionalisation and the concept of the international primary task. They identify a number of possible uses for this framework including as a heuristic device, for reflecting on practice, as an instrument for auditing schools and their international nature, or for providing analytical clarity in the context of research into international schools. The current study will extend the use of the analytical framework to explore ways in which it might contribute to an identification of the characteristics of ‘legitimate’ U.S. style international schools.

1.7 Research Aim

This study aims to deepen the understanding of factors that influence perceptions of institutional legitimacy among school heads in U.S. style international schools in Latin America and to contribute to an understanding of institutional legitimacy by identifying the specific characteristics that may establish a school as 'legitimate' within this context. To accomplish this aim, Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools will be used as an instrument to frame the analysis of the perceptions of school heads, and as a heuristic device to provide clarity in the discussion of the concepts that underpin those perceptions. In addition, the study aims to contribute to an understanding of the framework itself.

1.8 Research Questions

This study will focus on the following research questions:

- What factors do school heads in U.S. style international schools in Latin America take into consideration when judging the institutional legitimacy of a school?

- What factors do school heads in U.S. style international schools in Latin America take into consideration when judging the legitimacy of a school's claim to be "international"?

- How might the analytical framework for theorising the institutionalisation of international schools (Bunnell et al 2017b) contribute to an understanding of institutional legitimacy in the context of U.S. style international schools in Latin America?

1.9 Structure of the Thesis

Chapter 2 presents a review of the literature related to the concepts of legitimacy, institutionalisation and the institutional primary task, with a view to establishing an understanding of Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools. Chapter 3 presents the research philosophy, methodology and research design of the enquiry while Chapter 4 presents the results, analysis

and a discussion of the findings. Chapter 5 presents the conclusions and identifies the limitations of the enquiry suggesting possible areas for further research.

CHAPTER 2: REVIEW OF THE LITERATURE

This chapter examines the concept of legitimacy by reviewing types of legitimacy (section 2.2), states of organisational legitimacy (section 2.3), and legitimacy management in terms of both strategic legitimacy (section 2.4.1) and institutional legitimacy (section 2.4.2). Sections 2.5, 2.6 and 2.7 introduce the elements of the analytical framework for theorising the institutionalisation of international schools (Bunnell et al 2017b) through an examination of the pillars of institutionalisation, related carriers of institutionalisation and the institutional primary task. Section 2.8 explores the research related to the concept of legitimacy in international schools and examines some of the factors that might influence perceptions of that legitimacy using Bunnell et al's (2017b) analytical framework.

2.1 Legitimacy

Suchman (1995) defines legitimacy as "a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions" (p.574). The term "generalized" indicates that, according to Suchman, an organisation that is considered legitimate is resilient and can overcome specific, individual acts or events that could, under other circumstances, represent a threat to legitimacy. Occasional deviations from the norm are considered unique, atypical events and not characteristic of the organisation as a whole. By describing legitimacy as a "perception or assumption", Suchman emphasises that it is not an objective, concrete quality that can be acquired, possessed or exchanged, but rather a subjective judgment that resides in the relationship between actor and institution (Hurd 1999). Legitimacy is also "socially constructed" in that legitimacy judgments are based upon perceived levels of congruence between organisational behaviours and the collective beliefs, expectations and understandings of the audience.

Deephouse et al (2017) suggest that the term "desirable" should be deleted from Suchman's (1995) definition and legitimacy defined simply as the "perceived appropriateness of an organisation to a social system in terms of rules, values, norms and definitions"(p.32). However, for the purposes of the current study, the word "desirable" would seem to be appropriate. As active participants within the organisation, it is likely that school leaders will want, or 'desire' the

school to be legitimate not only within the generally accepted concept of education, but also in terms of fulfilling their own personal and professional expectations. Bailey (2015) and Bunnell et al (2017a) both explore how the challenges of teaching in an international school can have an impact on an individual teacher's professional practice and identity, suggesting that perceptions of legitimacy can have repercussions on an individual at an affective level. This is also likely to be the case for school leaders, many of whom will previously have been teachers themselves within international schools. The fact that the environment within those schools can be "particularly messy and tense"(Bunnell 2019b:2), would suggest that it is not enough for a school's actions simply to appear 'proper' or 'appropriate', they must also be in line with the individual's expectations and desires from a professional perspective.

2.2 Types of legitimacy

Suchman (1995) identifies three types of legitimacy: pragmatic, moral and cognitive. Each of these types of legitimacy indicates the lens through which an actor perceives the legitimacy of the organisation and their relationship towards it.

Pragmatic legitimacy is related to self-interest. An actor perceives an organisation as legitimate if it brings them value and appears to be responsive to their interests. In terms of the current study, pragmatic legitimacy is related to perceptions of whether or not actors within an organisation consider that it has their "best interests at heart" (Suchman 1995:578). Does it provide value in terms of professional experience? Does it value them as individuals? Is their commitment and contribution recognised? To consolidate institutional legitimacy from a pragmatic perspective, school leaders must ensure that stakeholders perceive the organisation to be trustworthy and transparent and see the actions of the organisation as being in their best interests.

Moral legitimacy is related to the evaluation of an organisation. How far is the organisation a model example of what it sets out to be? Does it achieve its goals? Does it use sound practices to achieve these goals? In terms of schools, judgments of moral legitimacy may be made with reference to outputs such as academic results, or in the implementation of widely accepted or 'best' pedagogical practices. Moral legitimacy may be perceived within the organisational

structure of the school, including the design of schedules and 'fair' assignment of teaching loads, together with procedures for evaluating student or teacher performance. Crucially for school leadership, moral legitimacy may also be considered "personal" and seen in the "charisma of individual organisational leaders" (Suchman 1995:581).

Cognitive legitimacy is based upon the perception of whether or not the actions within an organisation make sense. It is founded upon cognition rather than self- interest or evaluation and related to whether the actions of an organisation can be seen as predictable and meaningful, aligned with the expectations of the observer. If actors within an organisation understand why certain actions are taken, and accept the explanations of those actions as plausible, they are likely to see them as legitimate from a cognitive perspective. As such, cognitive legitimacy relates to how far the actions within an organisation can be taken for granted and how far alternatives are "literally unthinkable" (Suchman 1995:583). Within a school, this might relate to the organisation of the school into traditional subject areas, the assumption that students should be grouped according to their age, or the idea that they should be evaluated with traditional grades in order to monitor progress.

2.3 States of organisational legitimacy

Deephouse et al (2017) identify four basic states of organisational legitimacy, "accepted, proper, debated and illegitimate" (p.33). Firstly, the legitimacy of an organisation can be "accepted" in that it is taken-for-granted and unquestioned. A well-established school with a strong reputation that has been in place over time may fall into this category. Secondly, the legitimacy of an organisation can be "proper". In this case, legitimacy is based upon an evaluation and legitimate status is assigned on the basis of the results of that evaluation. For example, schools may gain or strengthen their legitimate status through a process of accreditation or inspection. Thirdly, the legitimacy of an organisation may be "debated". In this state, actors may question or challenge the activities or values of the organisation. The 'debate' reflects the presence of an active disagreement or questioning of actions that may endanger the legitimacy of the organisation. Finally, an organisation may fall into the category of "illegitimate". Under these circumstances, the actions within an organisation have been judged as inappropriate and the organisation "should be radically reformed or cease to exist" (ibid). School leaders must, therefore, look to establish and maintain school legitimacy in the state of 'accepted' or 'proper', identifying those factors that might serve to consolidate this status.

2.4 Legitimacy Management

The process of managing legitimacy is a challenging one that requires significant skill on the part of organisational leaders. Suchman (1995) distinguishes between strategic and institutional approaches to legitimacy management.

2.4.1 Strategic Legitimacy

Strategic legitimacy relates to the way that strategies are intentionally and deliberately employed to manage the perceptions of legitimacy of an organisation (Suchman 1995). Within the scope of strategic legitimacy, leaders may seek ways in which organisational actions can be adapted and adjusted to conform to a specific environment, or to the tastes of a specific set of clients. This poses a challenge for schools as actions designed to conform to the desires of one set of clients (e.g. parents) may be in opposition to the desires of another (teachers). Indeed, Bunnell (2019b) highlights the "complex set of tensions" (p.5) that school leaders may have to manoeuvre as the needs of one set of stakeholders may be pitted against another. Another strategy that could be employed to influence perceptions of legitimacy is the promotion of what Suchman (1995) terms "concrete, meritorious outcomes" (p.588). Within the context of a school, this may mean a focus on student performance results. Schools may also seek to establish legitimacy through what is termed "mimetic isomorphism" (ibid.589) whereby schools adopt the practices and procedures of other legitimate institutions, or seek to copy the structure and organisation of established models. While this may prove advantageous, it can also create challenges, as the practices and procedures of one context may not be wholly appropriate for another. Any sense of inappropriateness may undermine the very legitimacy the school sets out to achieve, leading, potentially, to a sense of "organisational hypocrisy", (Brunsson 1986:171)

School leaders may also choose to establish a state of 'proper' legitimacy through accreditation processes that validate and support their actions. James and Sheppard (2014) indicate that "accreditation is a means of legitimation especially where the schools are not required to adhere to any national standards" (p.6). However, while accreditation may provide structure and a sense of alignment with other institutions, Fertig (2007) also notes that it may place a school "between a rock and a hard place" (p.333), with isomorphic pressures forcing schools to accommodate their uniqueness to the pressures of externally imposed standards that require "uniformity and homogeneity" (p.344). Similarly, a school may become "trapped" in a conflict

between the demands of national authorities and those of an external accreditation organisation (Bunnell and Fertig 2020:3) in a situation that can threaten not only their legitimacy but also their very survival.

Schools may seek to establish and maintain legitimacy by identifying and attracting constituents whose values and expectations are in line with those of the organisation (Suchman 1995). While this may make sense in general terms, it may also cause issues in specific instances, as judgments of who might be considered the 'right' constituent (for example, the right student or teacher for the school) may be contested within a context where diversity, inclusion and equity are increasingly valued. Schools may also seek to establish legitimacy by adjusting their goals or moral criteria to fit the environment. However, this is a high-risk strategy given that it may result in a lack of direction, shared purpose, or a sense of goal displacement where a focus on what is considered truly important is lost. Organisational leaders can also employ specific strategies to manipulate environments through "molding constituent tastes" (Suchman 1995:591) in the form of advertising, or other forms of strategic communication. By deliberately shaping the story of the school, and promoting examples of success, stakeholders can be persuaded that the school is legitimate. However, this strategy also poses a risk and one that can result in what Ashforth and Gibbs (1990) refer to as the "self-promoters paradox". This paradox occurs when "protests of competence" (p.186) are implemented to promote legitimacy. The more this type of strategy is used, the more observers are likely to interpret the protests from a cynical point of view, assuming they are being used to hide the true nature of the institution.

A knowledge of how legitimacy might be established from a strategic perspective is therefore important for school leadership and school heads in particular. However, leaving the process to strategy alone may not achieve the desired results, particularly given that many of these strategies may be considered manipulative or superficial.

2.4.2 Institutional legitimacy

In contrast to the strategic management of legitimacy, the institutional management of legitimacy takes a systemic, structural approach. Selznick (1996) relates the process of institutionalisation to the establishment of certainty, order and stability. Loosely linked technical activities are consolidated within a pattern of social integration. With this approach, the

legitimacy of an organisation is established through a process of institutionalisation that ensures the organisation is effectively structured, and aligned with the beliefs and expectations of how such organisations should be run. As a result of this alignment, the actions of the organisation are perceived as being natural and meaningful (Suchman 1995). Selznick (1996) emphasises that "perhaps the most significant aspect of institutionalization is infusion with value beyond the technical requirements of the task at hand" (p.271). That is to say, that by providing stability, certainty and meaning, the process of institutionalisation gives actors within an organisation greater significance. They become a significant part of a whole that is bigger than the individual, contributing to a system that has a shared purpose or task.

Unfortunately, Suchman (1995) does not detail how institutional legitimacy may be gained, in fact, he states that institutional projects are frequently unpredictable and chaotic with "few detailed strategic prescriptions" being available (p.593). In contrast, Scott (2014) argues that regulative, normative and cultural-cognitive elements can promote "stabilizing and meaning-making properties" within an organisation (p.57), setting out a theory of institutionalisation that provides a framework for understanding how institutional legitimacy can be achieved.

2.5 The Pillars of Institutionalisation

Scott (2003, 2014) defines institutionalisation as a process consisting of the establishment of three pillars of institutionalisation. These include:

1) **The regulative pillar** (organisational rules and regulations that allow for monitoring and sanctioning)
2) **The normative pillar** (the establishment of norms and values, standards and expectations within an organisation)
3) **The cultural-cognitive pillar** (the creation of shared understanding and sense-making).

According to Scott (2014), these three pillars form the "central building blocks" of an institution that "guide behaviour and resist change" (p.57). As such, the effects of institutionalisation mirror the effects of legitimacy in the sense that they facilitate compliance with institutional requirements in organisations. This is particularly important in schools, where the loosely-linked organisational structures mean close supervision and monitoring may be difficult and where "coercive enforcement mechanisms" may be absent (Lenz and Viola 2017:942).

Establishing the pillars presents a number of challenges. In particular, while the pillars may form the central structure of institutionalisation, the process of building and sustaining those pillars is not a purely functional one, but one that can have an impact on members of the organisation at an emotional-affective level (Scott 2014). On the positive side, the pillars can provide stability and order, providing predictability through conformance to institutional guidelines and resistance to rapid change. However, any lack of alignment between the pillars, such as the implementation of rules and regulations that do not seem to be in line with institutional norms and values, may be negative, leading to confusion and disorder (Scott 2014). This can then create a sense of instability and injustice that can put an organisation's legitimacy at risk.

Working at different levels within an organisation, the pillars form a "continuum moving from the conscious to the unconscious, from the legally enforced to the taken for granted" (Scott 2014:59). At a conscious level, the regulative pillar is the most visible in the sense that it is frequently manifest in the published rules, regulations and mechanisms of control within an organisation (Scott 2014, Bunnell et al 2016a, 2017b). For school heads concerned with establishing institutional legitimacy, aligning actions with the regulative pillar is relatively straightforward as individuals are likely to comply with rules and regulations out of fear, guilt, or in order to avoid sanctions (Scott 2014; Bunnell et al 2016a). However, if established rules and regulations are not upheld, or actions not taken to follow through on violations to these rules, institutional legitimacy is likely to be brought into question. Similarly, if an actor does not perceive the value of a rule, does not understand its purpose, or does not believe it is beneficial to them as an individual, they may subsequently question its legitimacy and the value of their compliance.

The normative pillar manifests the norms and values of an organisation and provides a guiding framework for social behaviour and expectations within an organisation (Scott 2014). It both constrains and empowers actors and relies on a "deeper" sense of morality than that required for compliance with rules and regulations (ibid). Nonetheless, it is still "realist in an ontological sense" (Bunnell et al 2017a:5) relating to, for example, professional standards and the notion of appropriate behaviour within a professional setting. The motivation for compliance with these expectations may be external, but can also be intrinsic, with compliance being considered a matter of honour, of 'doing the right thing' (Scott 2014). Reinforcing conformity with the normative pillar is a more challenging task than that of the regulative pillar but is still "grounded" (Bunnell et al 2016a:13) in the sense that it aligns with general expectations of how schools

work and how teachers, as professionals, are expected to behave. At an affective level, non-compliance with the normative pillar is likely to provoke feelings of shame, with the risk that an individual may be considered unprofessional even though no rules have been broken (Scott 2014; Bunnell et al 2016a). In contrast, in a context where a shared set of norms or professional expectations does not exist, it may be the individual who feels they are upholding values while the institution is seen to be non-compliant.

The cultural cognitive pillar "is concerned with shared understandings of reality and sense making schema which enable meaning-making and interpretation" (Bunnell et al 2016a:7) and, as such, it sits at the deepest level of consciousness and rests on subconscious assumptions and taken for granted understandings (Scott 2014). The cultural-cognitive pillar creates the frameworks through which meanings are made and is manifest in the common definitions and shared conceptions of a given social reality. Ensuring conformity with this pillar is the most challenging aspect of institutionalisation (Bunnell et al 2016a) but is potentially the most important, as the cultural cognitive pillar influences the way members of an institution think about institutional phenomena. Perceived alignment with the cultural cognitive pillar has a significant impact upon professional identity (Bunnell et al 2017a) and creates feelings of certainty that allow individuals to act with confidence and conviction. They understand the context within which they are working and have clarity on how to react and respond to situations that may emerge. A lack of alignment, on the other hand, creates uncertainty, doubt and a sense of confusion (Scott 2014, Bunnell et al 2016a). Individuals do not know how to react or respond to emerging situations and may subsequently feel isolated, frustrated and confused. This confusion can lead to a growing sense of incompetence either on the part of the individual's own self-perception, or in terms of their perception of the school, a factor that inevitably influences their perception of the school as a legitimate organisation.

An understanding of how the factors that influence legitimacy are related to the regulative, normative and cultural-cognitive pillars of institutionalisation would seem to be important as it would allow school heads to identify and implement appropriate actions and interventions. A threat to legitimacy that comes from an employee's lack of shared norms is likely to require a different intervention than one that is the result of a failure to implement rules and regulations. Similarly, knowing how perceptions of legitimacy are influenced by deep-seated cultural-cognitive frameworks can enable school heads to identify when what may be needed is a shift in paradigms among stakeholders.

2.6. The Carriers of Institutionalisation

The three pillars are manifest and communicated within an organisation by a series of four carriers: symbolic systems, relational systems, activities and artefacts (Scott 2014 Bunnell et al 2016a; Bunnell et al 2017a; Bunnell et al 2017b Neufield 2019).

2.6.1 The Symbolic System

The symbolic system refers to the way in which rules, regulations, values, norms and cognitive frameworks symbolise the institution. From a symbolic perspective, the rules and regulations of an institution function not only to regulate behaviour but also to give expression to those values that are considered fundamental for the community (Van Klink 2016). For example, many schools define a set of institutional values and go on to stipulate how those values must be manifest in, for example, rules for student behaviour. There is an expectation that at a symbolic level, the regulative and normative pillars are coherent, and that the rules established in the regulative pillar are framed by and aligned with the values and norms expressed in the normative pillar. Subsequently, the implementation of rules and regulations that are not in line with institutional values is likely to undermine the perceived legitimacy of actions within an organisation.

At the cultural-cognitive level, the symbolic system encompasses the classification schemes and frames that help make sense of an institution (Scott 2014). For example, the way in which a school day is organised and divided into subject areas is symbolic of a particular mind-set or schema regarding education. Similarly, lesson design and organisation is symbolic of a particular pedagogical model or way of thinking about teaching and learning. Any lack of alignment between the model espoused by a school and the way in which it is symbolised within its structure is likely to bring into question the school's capacity to implement that model and impact negatively on perceptions of its legitimacy. For example, if a school claims to be international but does not incorporate any aspect of internationalisation within its pedagogical model, relying wholly on the host country national curriculum and locally hired teachers, the legitimacy of its claim to be international is likely to be undermined.

2.6.2 Relational Systems

Relational systems are made up of “connections among actors” (Scott 2003:886) and refer to “patterns of interaction within role systems” (Bunnell et al 2017b:10). In terms of the regulative pillar, relational systems may be manifest in aspects of an organisation such as governance structures that define the relationships between specific positions and the limits of authority designated to each one. These structures may have implications regarding the system of governance (Bunnell et al 2016a) including, for example, the perceived distance between different levels of authority. In terms of the normative pillar, relational systems can also be seen in the ways in which accountability is manifest within an organisation including how staff are held accountable for fulfilling institutional expectations, or how they hold one another mutually accountable for conformance to expected norms (Bunnell et al 2017b). At a cultural-cognitive level, relational systems have an impact upon “shared sense-making” (Bunnell et al 2017a:5), as individuals make sense of, and feel part of, an institution. If the relational systems within the institution are similar to those of other comparable institutions stakeholders are likely to feel a sense of stability and predictability, the individual will know and be comfortable with their place within the context of the institution. If the relational systems are markedly different, the lack of familiarity and subsequent sense of unpredictability may cause confusion, leading to stress and the risk of broken connections between actors within the institution. The leadership or governance structure of a school is a key driver of the relational systems (Bunnell et al 2016a) and crucial to creating a sense of stability and order.

2.6.3 Activities

The way in which the activities of an organisation reflect the pillars of institutionalisation is central to the establishment of legitimacy**.** In terms of the regulative pillar, activities that manifest or ensure compliance with the established rules and regulations support legitimacy (Bunnell et al 2017b), while activities that violate or contradict those rules and regulations have the opposite effect. Monitoring compliance and appropriately sanctioning violations against established rules and regulations also supports perceptions of organisational legitimacy, while a failure to do so may bring legitimacy into question. In relation to the normative pillar, Bunnell et al (2017b) indicate that activities have an impact on legitimacy in relation to agreed upon definitions of “roles, jobs/tasks, routines, customs and repertoires of co-operation”(p.11). They suggest that to be legitimate, activities within the normative pillar must be structured within management

systems that ensure compliance with professional norms and a sense of mutual accountability. In reference to the cultural-cognitive pillar, activities within a school that support perceptions of legitimacy are those that follow “jointly held habitual repertoires of practice to ensure a coordinated and coherent pedagogic approach” (ibid: 15).

When a clear and coherent pedagogical approach is established by a school, teachers are likely to feel supported within the organisation. They know what is expected of them and are able to make sense of their own activities. The lack of a coordinated and coherent approach, on the other hand, is likely to lead to confusion, with teachers experiencing isolation and sensing a lack of support from the institution. Leaders in international schools often face an additional challenge in that they must not only establish a coordinated and coherent approach within the institution, but also create a sense of coherence between the pedagogical approaches of overseas and host country teachers, avoiding any conflict or lack of consistency that may arise between the two (Hayden and Thompson 2010).

2.6.4 Artefacts

Artefacts are carriers of institutionalisation in that they are created within the context of the institution and possess regulative, normative or symbolic value (Bunnell et al 2017a; Bunnell et al 2017b). Examples of artefacts carrying the regulative pillar might be published certificates that provide evidence of compliance with regulations, or policy documents that have been approved and published by governing bodies. The normative pillar may be carried by visual representations of the mission and vision, or statements of institutional values. It could also be manifest in published ‘profiles’ for members of the school such as the teacher profile or student (learner) profile (Bunnell et al 2017b). At the symbolic level, artefacts might relate to any document or object that helps members of an organisation better understand that organisation and their role within it. Bunnell et al (2017b) describe how in a school, these could include curriculum guidelines, lesson planning formats and student performance data, all of which give structure, purpose and meaning to a teacher’s role. Ensuring that the school is appropriately ‘branded’ and that there is consistency and coherence in the artefacts that represent it is therefore important to legitimacy.

2.7. The institutional primary task.

Bunnell et al (2017b) argue that in order for a school to be considered a legitimate institution, the pillars and their related carriers must be underpinned by a legitimate "institutional primary task" (p.3). That is to say, the focus, or essential activities of the organisation, must themselves be perceived as legitimate and must shape the pillars and carriers of institutionalisation.

According to Miller and Rice (1967), the primary task defines the dominant input-conversion-output process of an organisation and is "the task that it must perform if it is to survive" (p.25). They argue that the primary task facilitates organisational effectiveness by allowing for the identification of priorities, ordering of related systems and specification of required resources. As such, the primary task is an important "heuristic concept" (ibid) that is vital to the understanding, establishment and development of organisational structure. It is in relation to this core task that all other tasks and activities within the organisation gain significance and value, and it is in performing this task that members of an organisation may either be engaged or disengaged through a sense of "overt satisfactions - reward, prestige, accomplishment - or with overt deprivations - low reward, disrepute, boredom"(p.31).

Bunnell et al (2017a) argue that a clear definition of the primary task is essential to the successful establishment of the pillars of organisational legitimacy, as it is this task that shapes and consolidates the way the pillars are "communicated and evidenced"(p.4). It is the primary task that gives the pillars meaning and value and that provides a sense of coherence and connection. A clearly defined primary task allows members of an organisation to see rules and regulations as a means to an end, rather than simply a method of control. In a similar way, an understanding of the primary task underscores the norms and values of the organisation, contextualising what is appropriate and helping to define roles, routines and the relationships between those who fulfil them. Of particular significance, however, is the way in which the primary task relates to the cultural cognitive pillar. The relationship between these two concepts is a reciprocal one, with an understanding of the primary task both affecting and being affected by the cultural-cognitive processes of interpretation and sense-making (Bunnell et al 2017a). The cultural-cognitive pillar requires people to "make sense of the world in a particular way and in an ongoing and on an unsupervised basis" (Bunnell et al 2016a:13). As noted earlier, it lies at the deepest level of consciousness, resting on deep-seated, often unexplored assumptions. Developing an understanding of the primary task through dialogue and discussion can bring those assumptions to the fore, facilitating the construction of shared understandings and

allowing individuals to make sense of the organisation and their role within it. At the same time, if the context allows, those discussions can shape the primary task itself, enabling the organisation to change and evolve, promoting continuous improvement.

Roberts (1994) notes that in an organisation such as a school that is focused on people, the dominant process or primary task is likely to focus on a “conversion” or “transformation” process where people enter in one state and leave in another (p.38). According to Roberts (1994), defining the primary task in this type of organisation requires an identification of the desired state, and the systems or processes needed to achieve that state. While this may seem a logical and linear process, creating a definition of the desired state and its related systems can be complex and influenced by deep-seated beliefs and values. Indeed, “different groups within the organisation may have different definitions of the primary task” (p.29) driven by a variety of cultural, political and social perceptions and arriving at a definition of the primary task can, therefore, be both challenging and difficult.

The process of identifying the institutional primary task is also challenging given that if the definition is too narrow, there is a risk that the institution may not survive as a restricted definition can prevent adaptation to a changing environment (Roberts 1994; Bunnell et al 2016a). In contrast, if the definition is too broad, the primary task will provide little in the way of guidance and result in a lack of clear direction (Miller and Rice 1967; Roberts 1994; Bunnell et al 2016a). Miller and Rice (1967) state that without an appropriate or agreed-upon definition of the primary task, “disorganization must occur”, putting the existence of the enterprise in jeopardy (p.28). Similarly, Roberts (1994) indicates that an inadequate or inappropriate definition of the primary task can result in a lack of cooperation and coherence, with each part of the organisation looking to defend its own performance and failing to coordinate with others. Such a “dismemberment” (Roberts 1994:31), may result in the emergence of an anti-task or task avoidance and impact negatively on the sense of institutional legitimacy.

With reference to schools, James et al (2007) indicate that a focus on the institutional primary task can bring about “a strong feeling of mutual accountability, a high level of trust and a spirit of collective effort” among teachers (James et al 2007:548). This high level of trust and mutual accountability is significant in that it not only consolidates the institutional legitimacy of the school but also has a positive impact on student learning.

In summary, the institutional primary task is the foundation upon which the pillars of institutionalisation are laid. Both the primary task and the pillars of institutionalisation are essential to building and strengthening perceptions of institutional legitimacy and any weakness or lack of congruence between the task and the pillars, or between the pillars themselves can cause the structure to fail and a sense of legitimacy to be lost. Table 1, adapted from Scott (2003, 2014) and Bunnell et al (2017b) outlines these concepts and presents the analytical framework for theorising the institutionalization of international schools that will be used within the current study. The study will build upon previous research by using Bunnell et al's (2017b) analytical framework to explore the concept of institutional legitimacy from the perspective of school heads in the specific context of U.S. style international schools in Latin America.

	Institutional Primary Task		
	Regulative Pillar	**Normative Pillar**	**Cultural-cognitive Pillar**
Symbolic systems	Laws, rules and regulations.	Norms, values, standards and expectations.	Classification schemes, frames and structures
Relational systems	Governance structures	Accountability structures	Shared systems of sense-making
Activities	Monitoring and sanctioning	Roles, routines and repertoires of collective action	Shared discourses and predispositions
Artefacts	Evidence of compliance with rules and regulations (certificates etc.)	Objects representing norms and values (Mission and vision statements etc.)	Curriculum documents, planning formats, student results.

Table 1. Analytical Framework for theorising the institutionalisation of international schools. Adapted from Scott (2004, 2014) and Bunnell et al (2017b)

2.8 Institutional legitimacy in international schools.

The lack of an agreed upon definition of international schools means it is difficult to make any assumptions about the shared characteristics of schools within the international school sector.

Hayden and Thompson (2013) indicate that “no international body has the authority to adjudicate on whether or not a school may describe itself as an ‘international school’” (p.4) and warn that any such nomenclature should be interpreted with caution. Similarly, Bunnell (2016) observes the concept of the ‘international’ school is vague one that “lacks consensus definition” (p.545) while Waldow (2018) indicates that it is concept upon which a wide variety of meanings can be projected. Nonetheless, Waldow (2018) argues that being ‘international’ is a “highly sought-after quality for a wide variety of different actors across many education systems” (p.248), and one that can be a “potential source of legitimacy” for a school (ibid). Indeed, being ‘international’ can project the image of a school as an elite educational institution, attendance to which can secure social status and privilege (Hayden 2011; Waldow 2018).

The following section reviews research into the concept of international schools and explores that research through the lens of Bunnell et al’s (2017b) analytical framework for theorising the institutionalisation of international schools. It does not aim to arrive at an indisputable definition of the term ‘international school’, but to highlight some of the issues that might impact upon perceptions of legitimacy within the international school sector.

2.8.1 Type A, Type B and Type C international schools

Hayden and Thompson (2013) identify three main subgroups of what could be termed ‘international’ schools: Type A, the ‘traditional’ international schools that cater for the needs of mobile, expatriate families; Type B, defined as ‘ideological’ international schools, that bring together students from across the globe with the aim of educating for global peace and understanding, and Type C, described as ‘non-traditional’ international schools that cater mainly for host country nationals seeking a higher quality education than is on offer in the host country education system. Hayden and Thompson (2010, 2013) indicate that Type C non-traditional or ‘modern’ international schools are similar to Type A ‘traditional’ international schools in that they provide a non-national curriculum mostly through the medium of English, but differ in that they are characterised by both ‘pragmatic’ and ‘ideological’ dimensions of internationalism. Type C schools are ‘pragmatic’ in that they prepare students for an increasingly competitive and globalised world, providing access to internationally recognised universities, but are also ‘idealistic’, aiming to form responsible global citizens who are capable of resolving “global problems that transcend national borders”(p.94). Hayden and Thompson (2010) also indicate that from a cultural-cognitive point of view, the teaching and learning in a Type C ‘modern’

international school is often characterised by a student-centred, constructivist approach that is associated with Western, liberal philosophies and that creates a “learning environment appropriate for the promotion of international-mindedness”(p.89). These schools frequently hire English speaking, Western trained staff not only for their native-speaker status but also because they are perceived as being more conversant with the expectations and requirements of a student-centred, pedagogical approach.

While the classification of schools into Type A, B and C subgroups is not specifically judgmental, it does, nonetheless, create a sense of a hierarchy in which schools with an international, expatriate student population (Type A) are, by default, seen as more ‘international’ and as having more legitimacy and distinction (Waldow 2018) than schools whose population is drawn from the host country. Indeed, Bunnell (2014) notes how this perceived hierarchy of international schools has been incorporated into an anecdotal ‘tier’ system that is often used to evaluate and categorize schools. Bunnell (2014) indicates that the highest level, Tier 1, incorporates “high-fee premium schools” (p.81) that usually offer an international curriculum such as the International Baccalaureate (IB). These schools are perceived to be legitimate, not only in their claim to be international, but also in terms of being high quality educational institutions. Tier 2 and 3 are characterised as “mid-market and lower market” schools (p.100), whose “reputation, value and experience” (p.152) suggest they have less claim to legitimacy. At these lower levels, not only may a school’s claim to be international be brought into question, but their legitimacy in broader terms may also be doubted. For example, Bunnell (2014) makes reference to comments by teachers on the website ISR.com that identify Tier 3 schools as those where professional development may be weak or non-existent and where the professional status of teachers may be questioned. Neither of these comments is related to factors unique to international schools, but it is clear that they influence judgments as to whether or not the actions in those schools are legitimate and representative of a quality educational institution.

2.8.2 Globalised English Medium of Instruction Schools.

Within this category, Bunnell (2019) distinguishes a number of different types. Firstly, he defines “elite international schools". These schools are usually located in major “Tier 1” cities such as “Bangkok, Paris or Shanghai” (p.4) and are focussed on the formation of “the future ‘global citizen’” (ibid). Many of the Type A and B schools described by Hayden and Thompson (2013) would seem to fall into this category. Bunnell (2019) then goes on to describe schools

that, rather than providing a specifically international curriculum, choose to 'transplant' national programmes from countries such as the US, UK, Canada, Australia and Singapore into an international setting. For example, British-ethos international schools are schools that follow a version of the National Curriculum for England in an international setting and American-ethos schools are schools that follow a more specifically U.S. based programme, often using the U.S. Common Core standards (Mahfouz et al 2019). Bunnell (2019) also describes the emergence of schools that blend foreign and local curricular programs, giving the example of a growing number of bilingual schools in China that offer the Chinese national curriculum blended with elements of the British education system. This combination, Bunnell (2019) argues, "seriously undermines their claim to be a legitimate 'international School'" (p.11).

Bunnell (2019) goes on to describe the emergence of two sectors and makes a distinction between "premium" and "non-premium" international schools (p.65). The notion of premium and non-premium would seem to be closely related to perceptions of legitimacy in that the term 'premium', with its connotations of superior quality, assumes that the actions of schools described as such are "desirable, proper or appropriate" in terms of expected "norms, values, beliefs and definitions"(Suchman 1995:574). The term 'non-premium', on the other hand, is pejorative, implying a lack of quality and an institution whose legitimacy may be debated, questioned or is at risk of becoming illegitimate.

2.8.3 Premium and Non-Premium Schools

Bunnell (2019) argues that it is possible to distinguish between 'premium' and 'non-premium' international schools by identifying the characteristics that typify each sector. The following section analyses each of these characteristics using elements of Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools to examine how each characteristic might influence judgments of legitimacy.

2.8.3.1 Accreditation

To be considered part of the 'premium' sector, Bunnell (2019) argues that a school must be accredited by a Western-based accreditation agency such as the Council of International Schools (CoIS) or Council of British International Schools (COBIS). Accreditation is a symbolic carrier of the regulative pillar, demonstrating compliance with the rules and regulations expected

of a legitimate educational institution. Accreditation by a Western-based accreditation agency symbolises the fact that a school complies not only with local regulations but also with internationally recognised standards and expectations at a normative level (Cambridge and Thompson 2004). The lack of an international accreditation, on the other hand, leaves a school open to doubt in terms of its claims to be a legitimate educational institution. Accreditation and authorization are therefore seen the "fault-line" between the "'premium/semi-elite' sector" and the "'sub-elite/non-premium' sector" (Bunnell 2019:158) of international schools. However, this is not without risk as the requirements of Western based accreditation systems may come into conflict with the regulations imposed by local authorities and, while accreditation can be seen as consolidating legitimacy at the international level, it could represent a threat to legitimacy at the local level (Bunnell and Fertig 2020).

2.8.3.2 Curriculum

Bunnell et al (2017b) explore the question of what makes a school 'international' and conclude that while the concept of an international curriculum is complex and problematic, implementing an international curriculum such as the IB Diploma as a school's institutional primary task is central to a school's legitimate claim to be international. Programmes such as those offered by the IBO are considered international not only in being developed "independently of government and national systems" (International Baccalaureate: 2020) but also because they aim to develop "intercultural understanding and respect" (ibid). (Bunnell et al 2017b) argue that the provision of such an international curriculum is the primary task that underpins the institutional nature of the school and provides the foundation for the regulative, normative and cognitive-cultural pillars of institutionalisation. Bunnell (2019) also indicates that 'premium' schools are those that are authorized and inspected by the International Baccalaureate Organisation (IBO) while 'non-premium' schools are those that offer non-international curricula. Nonetheless, while the provision of a curriculum such as the IB Diploma may be seen as legitimising a school's claim to be international, there are limits to seeing authorization by the IBO as guaranteeing institutional legitimacy at a broader level. According to the International Baccalaureate's "Rules for IB Schools" (International Baccalaureate a: 2020a), authorization to offer an IB programme does not guarantee quality. Responsibility for the implementation and quality of teaching within an IB programme, or any shortcomings in that implementation and quality, lies solely with the school. This distinction between having the authorization to offer the programme and guaranteeing the quality of that programme suggests that while a school may use the label 'IB World School' as a

symbol of their legitimacy, there is still a risk that actions within the school may not be fully aligned with the expectations of a legitimate educational institution. As such, the use of the term “non-international curricula” (Bunnell 2019:73) as a term that is indicative of a ‘non-premium’ school would seem to be based on a somewhat limited, binary view of international and non-international curricula. In particular, the association of “non-international curricula” with ‘non-premium’ schools assumes that such programmes may be lacking in legitimacy and distinction.

Within the category of non-international curricula, Bunnell (2019) makes a distinction between non-national and host country curricula, with non-national curricula being those that have been ‘transplanted’ from countries such as the U.S. or the U.K. While these curricula may be well established and legitimate in their own right, the fact that Bunnell (2019) does not identify them as indicators of a ‘premium’ school would imply that they are seen as less legitimate than, for example, programmes authorized by the IBO in consolidating a school´s claim to be international.

Bunnell (2019) argues that a school with a curriculum that is “blended” with that of the host country is lacking in legitimacy. However, assuming that a curriculum from the host country education system is characteristic of the ‘non-premium’ sector seems incongruous with the ideals of international-mindedness that are expected in an international school. Such a view implies that an education based on Western ideals, imported from ‘first-world’ countries such as the U.S., U.K., or Europe is more valuable, or more legitimate, than any curricula that might be developed locally. Indeed, this perspective seems to represent a “new form of colonialism” (Emenike and Plowright 2017:6) which would seem not only ironic, given the aims of premium schools for international-mindedness but could also represent a threat to legitimacy as schools increasingly come under scrutiny regarding issues of equity and diversity.

2.8.3.3. Networking

Bunnell (2019) indicates that ‘premium’ schools tend to be members of agencies such as The Educational Collaborative for International Schools (ECIS). ECIS is a professional organisation that includes “international and internationally-minded schools spanning the world, teaching multiple curricula in English and in multiple languages” (ECIS: 2020). Membership is open to a

range of schools including “emerging to mature international schools”, and schools that may be “local” with an international curriculum or outlook (ibid). This would suggest that ECIS incorporates both what Bunnell would term ‘premium’ and ‘non-premium’ schools and that ‘non-premium’ schools may seek to join the organisation in order to benefit from a type of ‘associative’ legitimacy. In other words, membership might bring benefits not only in terms of professional development and professional advice but also in terms of gaining legitimacy through associated with other ‘premium’ schools. This suggests that membership of organisations such as ECIS is an important relational carrier of the cultural-cognitive pillar through which schools can consolidate legitimacy.

While membership of agencies such as ECIS may bring a number of advantages, Bunnell (2019) also observes that these agencies have an “on-going power” that influences the international school sector and that allows a “non-critical narrative”(p.29) to dominate the scene, preventing certain topics such as the “increasing commercialisation and growing neo-colonialization of the field” (ibid) to be discussed. This suggests that while commercialisation and neo-colonialization may present a threat to the legitimacy of international schools, it is a threat that is potentially being ignored.

2.8.3.4 Tier Status

Bunnell (2019) indicates that ‘premium’ schools are those that are considered as having Tier 1 as opposed to Tier 2 school status. ‘Premium’ schools are more likely to be classified as Tier 1 schools in that they tend to have an expatriate population, and/or are explicitly ‘ideological’ in the sense of aiming to promote global citizenship and international mindedness. However, the concept of Tier 1 and Tier 2 seems to suggest a reliance on what Bunnell (2019) suggests is an out-of-date, normative model that is no longer valid. According to Bunnell (2019) this model relies on the assumptions of an “Old Era” (p.59) where the cultural-cognitive schema related to international schools was based on characteristics such as “a diverse mix of nationalities of students, international governance through bodies such as ECIS, an international teaching cadre and an international curriculum offering an international perspective” (ibid).

2.8.3.5. Location

Bunnell (2019) suggests that being located within what is known as a ‘Tier 1’ city is also

significant in terms of the characteristics of a 'premium' school, with Tier 1 cities being those that are major, or capital cities within a country. As such, the location of a school is interpreted as a relational carrier of the cultural-cognitive pillar, with location an integral part of a school's identity. Being located in a Tier 1 city suggests the school community may be drawn from an elite, cosmopolitan population with well-connected stakeholders who are at the hub of global networks and organisations. In contrast, being in a Tier 2 city suggests a parochial, less well-connected population that may lead to the impression of a smaller school with fewer amenities and on the whole, a lower socio-economic status.

The association of 'premium' status with Tier 1 cities may present a challenge to schools in Latin America given that studies such as that carried out by the Economist Intelligence Unit (EIU: 2020) indicate that the economy of Latin America lags behind that of Asia, Europe and the U.S. suggesting that even capital cities within the region may be considered Tier 2.

2.8.3.6. Demand

According to Bunnell (2019), 'premium' schools are in high demand with large waiting pools for entry. This high demand indicates that premium schools are perceived as legitimate in the sense that they are "desirable" (Suchman 1995:574). From a cultural-cognitive point of view, the school symbolises the acquisition of social capital and entry to an 'elite' social network with parents prepared to pay large debentures to assure a place for their child.

2.8.3.7. Quality

Bunnell (2019) indicates that 'premium' schools are those that are "quality assured" (p.73), while 'non-premium' schools achieve only "'satisfactory' quality" (ibid). From this perspective, 'premium' schools are associated with having moral legitimacy (Suchman 1995). It is assumed that they implement sound pedagogical practices at a normative level, leading to ´high-level´ outputs in terms of academic results. Bunnell (2019) also suggests there is a "growing globalisation trend towards global assessment of educational attainment and standards, led in part by the Paris-based organisation for Economic Cooperation and Development and its controversial PISA tests" (p.8). Rankings on these and other high-stakes tests are used as a seemingly objective indicator that can identify a school as good or bad (Angus 2015). Indeed,

test results have become an important indicator of school quality and a reflection of legitimate status. However, the focus on test results could also represent a threat to legitimacy if test preparation is allowed to displace the more idealistic primary task of student learning.

2.8.3.8. Non-profit.

Bunnell (2019) indicates that being market-driven and for-profit is an indicator of a school with 'non-premium' status, suggesting that the increased commercialisation of the international school sector has led to the normalisation of a focus on "profits and financial capital accumulation" (p.115) that has potentially displaced the primary task of student learning. However, James and Sheppard (2014) indicate that many schools would not be able to operate sustainably if they did not pay attention to finances, and suggest that the profit/non-profit status of schools is a is complex issue around which few assumptions can be made. Similarly, Bunnell (2014) suggests that the role of for-profit schooling is more complex than the simple assumption of "they are out to make a profit" (p.111). Machin (2014) suggests that for-profit education may be perceived as an "oxymoronic anathema" (p.27), but that it is increasingly becoming a reality for many school leaders, noting that this reality frequently creates tensions for school leaders who are asked to "simultaneously safeguard both educational values and the commercial bottom line. They are expected to serve two masters" (ibid). Bunnell (2019) argues that such a tension between economic and commercial values can cause a "values deficit" where the "values espoused by the school do not match the reality of ownership and organisational operation" (p.163). This lack of alignment potentially impacts negatively on the normative pillar by casting doubt over the nature of shared values. Caffyn (2018) also indicates "Most international schools are private businesses and, as such, are placed on an uneasy borderland between economic and learning goals" (p.508). Here, the suggestion is that tensions between economic and learning goals could represent a threat to legitimacy if economic goals are allowed to displace student learning as the institutional primary task.

2.8.3.9 Teacher Profile

Bunnell (2019) indicates that 'premium' schools are characterised by a high number of qualified teachers, while 'non-premium' schools may employ a significant number of teachers without professional qualifications. Having qualified teachers lends legitimacy to a school in that it symbolises compliance with both local and international regulations (as defined in requirements

for accreditation) together with professional standards and expectations. However, while qualified teacher status may be important, it may not be the most significant factor in determining whether a teacher is “desirable, proper and appropriate” (Suchman 1995:574) for any particular organisation. Indeed, the concept of teacher profile is a complex one, particularly in international schools where a lack of familiarity with the institutional and/or cultural context of a school may be a de-stabilising experience, posing a risk to a teacher’s “daily work and professional identity” (Bailey 2015:6). Even qualified and experienced teachers may find themselves “unexpectedly de-skilled” (Stirzaker 2004:32) with the pedagogical strategies and techniques they have used elsewhere failing to have the same success with an unfamiliar student population. As a result, while from an external perspective teacher qualifications may be vital, from an internal perspective, the concept of ‘fit’ may also be significant. Indeed, no matter what their qualifications, teachers may question the requirements of an unfamiliar curriculum or the demands of an unfamiliar schedule and if the answers provided do not fit with their expectations, may question the legitimacy of those aspects of the school or choose to implement alternative strategies themselves.

2.8.3.10 Overview of ‘Premium’ Schools

Table 2 provides an overview of the characteristics of ‘premium’ schools as identified by Bunnell (2019) seen through Bunnell et al’s (2017b) analytical framework for theorising the institutionalisation of international schools. The table facilitates a comparison of the characteristics of ‘premium’ schools with those of legitimate institutions indicating the ways in which the two might be aligned and thus giving valuable context to the current study.

	Institutional Primary Task: Provision of an international curriculum		
	Regulative	**Normative**	**Cultural/Cognitive**
Symbolic systems	Accredited by IBO	Alignment with values and expectations of IBO	Alignment with cultural-cognitive schema of Tier 1 international school (expat population, focus on international mindedness)
	Accredited by CoIS / COBIS	Alignment with western-based educational standards and expectations	Long waiting lists and debentures symbolise desire to acquire social status and entry to elite social networks
Relational systems	Non-profit organizational structures	Quality assurance through management systems that promote mutual accountability	Membership of professional organisations e.g.ECIS
			Tier 1 City location.
Activities	Inspection by IBO	Sound pedagogical practices	
	Inspection by accreditation agency		
Artefacts	IB World status and Accreditation certificate(s)	Qualified teachers	Student results reflect high performance

Table 2: An overview of 'premium' international schools (Bunnell 2019) using Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools.
Adapted from Bunnell et al (2017b) and Bunnell (2019)

2.8.4. International schools in Latin America

In a study of schools in Chile and Argentina, Resnik (2016) argues that the education systems of Latin America are not only "bifurcated" (Stromquist 2006:975) but characterised by a hierarchy that places bilingual schools offering the IB to the children of "higher class families" (Resnik 2016:307) at the top, followed by a variety of private schools whose fees "vary according to the income level of their middle class clientele" (ibid). All of these private schools, it is argued, are outside of the reach of the lower or "popular" classes. Resnik argues that the differential in cost is caused by schools employing expatriates whose salaries are "much higher than those of local teachers" (ibid) in order to deliver the curriculum in English.

In a study of schools in Colombia, South America, De Mejia (2013) makes a distinction between international bilingual schools and national bilingual schools but refrains from identifying one or the other as being at the top of a 'hierarchy' of schools. The international bilingual schools described by De Mejia (2013) share many characteristics with the Type C or 'modern' international schools identified by Hayden and Thompson in that most were founded by non-Colombians for children of expatriate families but have evolved, over time, to cater for a majority of host-country students. Focusing on the issue of bilingualism, De Mejia (2002, 2013) indicates that, unlike Type A international schools that have a high level of expatriate students and where English is either the first language of a displaced student population or a ´lingua-franca' between a variety of nationalities, the acquisition of English in 'International Bilingual Schools' in Colombia is elective. It is a deliberate choice rather than a necessity. By sending their child to an international bilingual school, parents are signalling their belief that the acquisition of English will bring a number of advantages, including significant social capital. From this perspective, the provision of a programme that promotes a "high level of bilingual proficiency" (De Mejia 2002:175) is an important element of the school's primary task.

According to De Mejia (2013), international bilingual schools in Colombia are 'international' in that they are accredited by an international body such as the International Baccalaureate or a U.S. accreditation agency, with students gaining a qualification that will give them access to overseas universities in Europe or the U.S. These schools are characterised by a culture different from that of the host country, importing a significant portion of their teaching materials from overseas and hiring expatriate teachers. De Mejia (2002) notes that while many international bilingual schools employ expatriate staff in leadership positions, national bilingual schools are more likely to employ host country nationals to lead the school.

The international bilingual schools described by De Mejia (2013) lie on the boundary of the premium and the non-premium sector as identified by Bunnell (2019), with characteristics such as accreditation that serve as an indicator of 'premium' status, but with a host country national student population that suggests they fall into the category of 'non-premium'. Complicating this issue even further, is the fact that while De Mejia (2013) indicates authorization by an international agency is a distinguishing factor between international and national bilingual schools, an increasing number of traditionally national bilingual schools are choosing to implement programs such as those offered by the IB and/or to become accredited by US regional accreditation agencies such as Cognia (Bose et al 2017). This suggests that having a marker of international accreditation, even for a school that traditionally identifies as national, is perceived as a way in which to increase legitimacy and distinction (Waldow 2018).

2.8.4.1 U.S. Style International Schools in Latin America

The U.S. style international schools within the current study fall into the category of 'international bilingual schools' as defined by De Mejia (2013) in that they offer a bilingual programme, are accredited by an international organization and employ expatriate teachers and school leaders. While they may or may not offer the IB, they are frequently seen as being at the 'top' of the private school hierarchy, charging high fees in order to fund the employment of expatriate staff. However, the fact that the student population is mainly local, the curriculum often U.S. based rather than explicitly 'international', and 'blended' with that of the host country, presents a threat to legitimacy in that they could be perceived as belonging to the category of "non-premium" schools (Bunnell 2019).

Bunnell (2019) indicates that 'American-ethos' schools tend to be competency based or pragmatic in nature, designed to facilitate a smooth transition between the international context of the school and higher education in the U.S. However, a study of mission statements from U.S. style international schools in South America (Bittencourt and Willets 2018) suggests that U.S. style international schools in Latin America do not have a purely pragmatic purpose but are also focused on ideology and the development of students as global citizens. At the same time, Bittencourt and Willets (2018) indicate that significant tensions are evident in the way that the schools juxtapose the "existential, experiential and multicultural" (p.521) tendencies of

'international' learning with the "rigour, standardisation and certification" (ibid) that is necessary to achieve their 'pragmatic' purpose, questioning whether the two can be compatible. This potential lack of compatibility may result in a threat to legitimacy, particularly if the 'idealistic' aims of internationalism are "recast" with aims such as the development of global citizenship becoming "a product that can be acquired and leveraged for instrumental gains" (p.523).

2.8.5 Summary

The lack of a clear definition of international schools in general and of U.S. style international schools in particular, together with the tendency to judge schools in terms of 'tiers' or 'premium' versus 'non-premium', presents a significant challenge for school heads in U.S. style international schools in Latin America. Added to this, the fact that school heads have to not only ensure the legitimacy of a school's claim to be international but also ensure that the school is recognised as a legitimate educational institution means they face a double challenge (Fertig and James 2016). Research that helps to identify the key factors that influence perceptions of legitimacy within would therefore seem to be of significance, not only in terms of contributing to knowledge within the field, but also because it may prove to be of practical use.

CHAPTER 3: RESEARCH PHILOSOPHY, METHODOLOGY AND RESEARCH DESIGN

3.1 Research paradigm

Chapter 3 sets out the theoretical framework behind the research and details the research design and methods of data collection and analysis before concluding with a review of ethical considerations and an analysis of validity.

The purpose of this study is to deepen the understanding of factors that influence institutional legitimacy in international schools. The study focuses specifically on the perceptions of school heads in the context of U.S. style international schools in Latin America and aims to explore the process of interpreting and making sense of institutional legitimacy with "the goal of understanding the complex world of lived experience from the point of view of those who live it" (Schwandt 1998:221). The study does not attempt to reduce the concept of institutional legitimacy to a series of measurable, quantifiable elements nor identify a set of cause and effective relationships (Cresswell 2013), but takes a qualitative approach in order to incorporate a complex picture that involves multiple perspectives (Creswell 2013). It aims to explore the views of school heads and to address how those views might converge and interact, using an inductive process to uncover patterns and emerging themes with a view to developing new insights and understandings (Patton 2002, Suter 2012).

The study takes the position that legitimacy is part of a complex social reality that "hinges on the cognitive faculties of human beings, who possess the ability to assign meanings to people, objects, events and experiences, and recognize these as collectively meaningful" (Pernecky 2016:141). It sees legitimacy as "socially constructed", a phenomenon that "comes into existence, so to speak, as the result of the relationships and behaviour among socializing human agents" (ibid). In line with this position, the study draws on a hermeneutic phenomenological perspective, that sees experience as "embedded within contexts" (Idahosa and Vincent 2019:783) and that understands experience as being relative to an individual's "social and cultural backdrop" (ibid). It takes into consideration that while meanings may be subjective and multiple, they are not built in isolation but depend upon a background of shared understandings as expressed through language and other manifestations of social practice (Schwandt 1998). This hermeneutic phenomenological approach allows for "an examination of individual characteristics (attitudes, perceptions, beliefs, values that guide action) and at the

same time an examination of the structures, discourses and context that shape those characteristics"(Idahosa and Vincent 2019:783).

3.1.1 Hermeneutic phenomenology

Hermeneutic phenomenology has its origins in the works of Husserl, Heidegger and Gadamer. The focus of the work of Husserl (1859-1938) was "the study of phenomena as they appeared through consciousness" (Laverty 2003:23) in what he termed the "lifeworld", a world that is "inhabited from one's first person perspective, rather than observed from a third-person perspective" (Gorichanaz et al 2018:282). In contrast to the objective view of reality equated with the world of science, Husserl viewed "conscious awareness" as the starting point for building a "knowledge of reality" (Laverty 2003:23) with consciousness itself being a "co-constituted dialogue between a person and the world" (ibid). Within this co-constituted dialogue, Husserl believed that in order to capture the essence of a phenomenon, it was necessary to "suspend judgment" and "bracket out the outer world as well as individual biases" (ibid). Phenomena should be approached in a way that was as "free as possible from cultural context" (Dowling 2007:4), with the researcher looking to "transcend their own prejudices" (Stephenson et al 2018:263) breaking free from context and preconceived ways of knowing in order to reach the pure essence of a phenomenon.

Like Husserl, Heidegger (1889 -1976), was also concerned with phenomenology in terms of the "life world or human experience as it is lived" (Laverty 2003:24). However, he disagreed with Husserl's philosophy of phenomenological reduction and developed an "interpretive phenomenology", seeing the interpretation of the individual as "critical to the process of understanding" (ibid). For Heidegger, the researcher is "unable to, nor should, divorce themselves from the event being studied" (Stephenson 2018:263) and should make sure to "identify and disclose their influence and prejudices on and with the study" (ibid). Taking an ontological stance, Heidegger proposed a 'hermeneutic phenomenology' that looked to disclose the 'meaning of being' through an analysis of human existence as manifest in text. He argued that in order to disclose this meaning, interpretation should be a "reciprocal activity" (Dowling 2007:9) and established the concept of the 'hermeneutic circle' to illustrate how interpretation is never a "presupositionless grasping of something previously given" but is "pre-given with fore-having, fore-sight and fore-conception" (Heidegger 1927:150). He argues that all human inquiry

is circular and that the very act of seeking means that some element of meaning must already be available to us.

Gadamer built on the work of Heidegger to develop an epistemological position towards hermeneutic phenomenology that enables a more “practical application” (Laverty 2003:25). Gadamer saw understanding and interpretation as inseparable (Annells 1996) and believed that attempting to eliminate preconceptions or prejudices (in the sense of judgments made before all elements of a situation have been examined) was not only impossible but also absurd. From this perspective, rather than setting aside, or ‘bracketing’ that which may influence our understanding, any preconception or bias must be brought to the fore and acknowledged as part of the process of interpretation (Tuohy et al 2013). While unexamined prejudices can “limit the horizon of understanding” (Spence 2001:626), the exploration of new information alongside a simultaneous examination of previous experience can lead to new possibilities and potential for understanding (Spence 2001; Stephenson 2018). Indeed, Gadamer saw interpretation as a ‘fusion of horizons’ in which understanding evolves and develops through the fusion of different vantage points, including that of both participant and researcher, in a reciprocal process that contains the “ever-present possibility of coming to new understandings”(Spence 2001:625). This “hermeneutic circling” becomes a process of “engaging with research texts in a variety of ways, and coming back to the same piece of text over and over again to seek further meanings and understandings”(Stephenson et al 2018:265). The researcher does not seek to uncover “absolute truths” but recognizes “there will always be more to discover, more to deeply reflect on, and more to share” (ibid).

Research within the paradigm of hermeneutic phenomenology is not bound to a specific structure or methodological practice but, like most qualitative research, is characterized as being “inductive, emerging and shaped by the researcher’s experience in collecting and analysing the data”(Creswell 2007:19). It resides in “how one attunes, questions and thinks in and through evolving methods” (Stephenson et al 2018), rather than by a fixed set of methods that can be applied in a variety of circumstances. Hermeneutic phenomenology focuses on direct experience (Cohen et al: 2018) and uses “rich, contextual data” (Crowther et al 2016:827) to “draw attention to the multiple meanings within phenomena and draw the reader/listener into new understandings” (p.828). It takes the interpretation of texts as its central purpose (Kvale and Flick 2007) and incorporates a dialogic process, with interpretation being seen as “not *within*, but *between* persons” (Polkinghorne 1983:47 emphasis in original). Research within the

paradigm of hermeneutic phenomenology does not attempt to establish an objective or unbiased stance but recognises that all judgments involve prejudice and that all questions are leading questions (Patterson and Williams 2002). It also acknowledges that it is impossible to stand outside language systems and cultures to obtain a viewpoint that could be considered absolute, or identify an absolute truth advocating the view that "talk or dialogue is not an incidental condition of inquiry; it is the very life of inquiry, discovery, and truth itself" (Wachterhauser 1986:33). From the perspective of hermeneutic phenomenology, research is a circular process with no end point that could be considered definitive, but one where all meaning and behaviour is open and subject to change (Patterson and Williams 2002)

The current study adopts the approach of hermeneutic phenomenology and aims to study the concept of institutional legitimacy in international schools through an exploration of the "attitudes, perceptions, beliefs [and] values" (Idahosa and Vincent 2018: 783) of school leaders within those schools. It does not aim to reduce the concept of legitimacy to a specific definition, nor identify a series of cause and effect factors but to engage in an examination of the "structures, discourses and context[s]" (ibid) that may shape perceptions of legitimacy in order to uncover emerging themes and patterns, and to contribute towards and understanding of the concepts involved.

3.1.2 Hermeneutic phenomenology and validity

While it is necessary to be open and flexible when planning a design within the paradigm of hermeneutic phenomenology (Suter 2012), it is also vital to focus on aspects of the design that will underscore rigor and ensure that the research can be considered trustworthy, transparent and open to critical thinking (ibid). Lincoln and Guba (1985) identify a number of criteria that can be used to achieve rigor in qualitative research, including transferability (the generalisation of findings to other contexts), dependability (achieved through the use of strategies such as audit trails, rich documentation, triangulation, and intercoder agreement) and confirmability (reached through researcher self-reflection and the consideration of alternative interpretations). The final category of credibility, often considered the most important, refers to the "believability of the findings and is enhanced by evidence such as confirming evaluation of conclusions by research participants, convergence of multiple sources of evidence, control of unwanted influences, and theoretical fit" (Suter 2012:365).

Patterson and Williams (2002) question the relevance of these methodological procedures to hermeneutic phenomenology and argue that no single set of procedures for establishing validity is possible within a philosophy that does not recognize a “single, correct interpretation of phenomena” and where there is “no defensible method for establishing that truth exists”(Patterson and Williams 2002:32). For example, they argue that peer auditing fails as it is equally as subject to bias as the interpretation of the original investigator. Triangulation also ‘breaks down’ as the epistemic perception of knowledge as a contextually bound construction does not lend itself to the expectation that consistent interpretations will be found in different contexts (Patterson and Williams 2002:32). Similarly, they do not see respondent validation as guaranteeing trustworthiness, as these validations are, themselves, interpretations of an existing text. Instead, Patterson and Williams (2002) identify “three overarching instrumental criteria for evaluating “the research product”” including “persuasiveness, insightfulness, and practical utility” (p.33).

Patterson and Williams (2002) describe “Persuasiveness” as residing in the ability of a researcher to present an argument that persuades a reader to acknowledge a viewpoint whether or not they agree with it. Rather than aiming for isolated inter-rater agreement, persuasiveness looks to “persuade” or engage peer reviewers in a “dialogue devoted to helping develop an understanding of the issue, rather than simply defending a position or serving merely as gatekeepers for scientific accreditation” (Patterson and Williams 2002:34). “Insightfulness” refers to the fact that in a rigorous investigation, the presentation of the data should be interpretive rather than simply descriptive. Insights should be obtained through the identification of patterns that give meaning to the text and enrich understandings of the phenomenon under study. Finally, the criterion of “practical utility” (ibid: 35) seeks to respond to the aims of the inquiry and uncover interpretations that can be put to practical use.

These criteria represent a shift from a focus on uncovering “truths” to “a predominant concern for the usefulness of knowledge in enhancing understanding, promoting communication, or resolving conflict” (Patterson and Williams 2002:35). Nonetheless, as Patterson and Williams (2002) state, hermeneutic research is not an anti-science, or a call for “anything goes” (p.36). Rather it is an “empirical enterprise characterized by critical and ‘meaningful’ thought” (ibid) that begins from a particular standpoint as identified by the “forestructure of understanding” then going through a “rigorous and systematic cyclical analysis” (ibid) whereby interpretations are evaluated and modified before data is presented as evidence of conclusions. In order to

highlight this “forestructure of understanding“(ibid) in the current study, the following section identifies the position of the researcher before going on to outline the research design.

3.2 Position of researcher

Researchers within the paradigm of hermeneutic phenomenology do not attempt to establish an “objective, unbiased or “blind” position” (Patterson and Williams 2002:25) but acknowledge the role of the researcher in terms of their influence on interactions with research participants and their interpretation of the data. Indeed, Charmaz (2014) notes that “if we start with the assumption that social reality is multiple, processual and constructed, then we must take the researcher’s position, privileges, perspective and interactions into account as an inherent part of the research reality” (Charmaz 2014:13). As a result, “transparency about the researchers’ pre-understandings is essential” (Crowther et al 2017:829) as it is these pre-understandings that not only “initiate our inquiry” (ibid) but influence our choice of method and our interpretation of results. Indeed, a lack of recognition of these pre-understandings may lead to a subconscious tendency towards “confirmation bias” (Suter 2012:351) whereby the researcher seeks out evidence that “supports their initial conclusion or personal view while other data are filtered” (ibid).

The current study aims to contribute to research on institutional legitimacy in international schools through an exploration and analysis of data that looks to uncover emerging themes, patterns and connections between multiple perspectives. I focus on the perceptions of school heads rather than those of teachers, parents or students, given that the former are in a position not only to judge institutional legitimacy but also to be active in establishing and maintaining that legitimacy. Through an identification of some of the factors that might influence school heads’ perceptions of institutional legitimacy in U.S. style international schools in Latin America, I hope to contribute to an understanding of the particular characteristics of institutional legitimacy in those schools and to provide insight that might be of use to these individuals.

It is important to acknowledge that my own position as a school head in a U.S. style international school in Latin America is likely to have an impact on the research, both in terms of data collection (including the focus of questions in the interview process), and data analysis and interpretation. However, in order to offset the risk of limiting the research by imposing preconceived ideas and biases, I use a "forestructure of understanding"(Suter 2020:351) or

"conceptual framework" (Patterson and Williams 2002:38) that is based on insights from prior research as a way in which to help guide a search for understanding. This forestructure of understanding is manifest in the analytical framework for theorising the institutionalisation of international schools (Bunnell et al 2017b) and is used to structure the analysis of data in a way that both capitalizes on insights from prior research but also remains open to the uniqueness of the specific situation being studied (Patterson and Williams 2002).

3.3 Research Design

This section will review the characteristics of the research participants (3.3.1) and the schools they represent (3.3.2) before going on to describe the interview and interview format (3.3.3 and 3.3.4)

3.3.1 Research Participants

At the preliminary stages of the research, the intention had been to explore institutional legitimacy and the legitimacy of a school's claim to be international from the perspective of teachers through a case study of one particular school in South America. However, a trial focus group with teachers and academic coordinators identified a number of problems with the research design. The majority of focus group participants indicated that they felt comfortable with the researcher, and did not feel the hierarchical relationship between researcher (the school head) and participants consciously affected their responses. However, they did feel that this relationship and the focus group format itself could undermine the validity of the data. In particular, one teacher indicated that the focus group format felt somewhat competitive and that while there was trust between participants, there was still a sense they might seek to impress one another and the researcher, rather than providing accurate information. Another felt that the participant perspectives were somewhat narrow and that each was speaking from a specific perspective or area of interest, rather than providing a whole-school, holistic point of view that could be more effective and informative for the study. As a result, the research design was reviewed and, in consultation with the research supervisor, a decision made to focus on school heads rather than teaching staff as the research participants. This was done with the intention of i) minimising the impact of the relationship between researcher and participants, ii) widening the scope to incorporate perspectives from other schools and iii) ensuring a more holistic, big

picture perspective that recognizes that school leadership is fundamental to the successful establishment of legitimacy (Fidan and Balci 2018).

After the shift in focus, a message was sent to the 59 individuals who were identified as holding the position of school head (as defined in section 1.2 of the current study), in schools belonging to the Association of American Schools in South America (AASSA). Another eight (8) school heads from schools belonging to the Tri Association of American Schools in Central America, Colombia, the Caribbean and Mexico were also invited to participate during an annual recruitment fair in the U.S. In all, 67 school heads received an invitation to participate in the study. Invitations were sent via email and through direct contact at an in-person recruitment fair for international schools. Eight (8) respondents indicated that they were available for in-person interviews while six (6) offered to take part in an online interview via Skype. Of the school heads who agreed to take part, eleven (11) come from schools that are members of AASSA, three (3) from schools that are members of the Tri Association and six (6) from schools that are members of both AASSA and Tri Association.

The first phase of in-person interviews took place in late November, early December 2019 at the annual AASSA recruitment fair in Atlanta, Georgia, U.S. Virtual interviews then took place between mid-December 2019 and early January 2020, with the final phase of in-person interviews taking place at the annual recruitment fair held by the University of Northern Iowa, in the U.S. in late January 2020.

At the time of the interviews, all participants held the role of school head as identified in section 1.2 of the current study. Nine (9) of the participants were U.S. citizens with others being Canadian (two participants), British (two participants) and Spanish (one participant). None of the participants were citizens of the host countries. Six (6) of the participants had worked in regions other than Latin America or their home country, while the remaining eight (8) had worked exclusively in Latin America or their home country.

The fourteen participating school heads represent 11.76% of the combined 119 schools in both AASSA and Tri Association. In turn, the 119 schools of AASSA and Tri Association represent approximately 10% of the total number of international schools in Latin America as identified by ISC Research (2017). This sample size means that results from the study cannot be generalised to other similar schools, however, the nature of the interviews allowed for “rich,

contextual data" (Crowther et al 2016:827) to be gathered and for new understandings to be developed that could prove informative and illustrative for those schools.

3.3.2 Represented Schools

The fourteen participants represent schools in the following countries: Mexico; Costa Rica; Honduras; Trinidad and Tobago; Colombia; Ecuador; Bolivia; Brazil and Peru. All 14 participant schools were classified as U.S. style international schools according to the criteria established in section 1.4 of this study and as detailed below:

1. The school offers a bilingual programme with a curriculum based, at least in part on U.S. standards
2. The school is accredited by a U.S. based accreditation organization and is authorized to issue a U.S. High School Diploma
3. The school employs both local and expatriate (including North American) teachers.
4. The school admits both local and expatriate students
5. The school is a member of a U.S. based professional association such as AASSA or the Tri Association of American Schools in Mexico, Central America, Colombia and the Caribbean.

Table 3 identifies the criteria by which each school was identified as a U.S. style international school for the purposes of this study. It includes the specific percentage of expatriate students and faculty for each institution (as identified by participants) together with additional information regarding curriculum (in terms of the AP and IB programmes), and profit or non-profit status. It should be noted that with a view to protecting the confidentiality of participants, the letters used to identify schools within this table do not correspond to the numbers assigned to the respective school heads who participated.

3.3.3 Interviews

In order to obtain a "rich set of contextual data involving multiple perspectives that may draw the reader into new understandings" (Crowther et al 2017:827), semi-structured interviews were used with each of the fourteen participants. Seidman (2013) indicates that the standard model of in-depth phenomenological interviewing "involves conducting a series of three separate interviews with each participant" (p.21) in which the first establishes the context, the second allows participants to reconstruct details, and the third encourages participants to reflect on the

	CRITERIA FOR IDENTIFICATION AS U.S. STYLE INTERNATIONAL SCHOOL							ADDITIONAL INFORMATION			
School	Member of AASSA and/or Tri Association	% expatriate staff	% expatriate students	Offers bilingual programme	Accredited by U.S. organization	Authorized to issue U.S. High School Diploma	Curriculum based in part on U.S. standards	Offers Advanced Placement (AP) programmes	Offers one or more IB programmes	Exists as an independent, non-profit organization	Owned by an international for-profit education company.
A	x	25	3	x	x	x	x	x		x	
C	x	35	45	x	x	x	x	x		x	
D	x	20	6	x	x	x	x	x		x	
E	x	28	5	x	x	x	x	x		x	
F	x	20	5	x	x	x	x	x		x	
G	x	50	60	x	x	x	x	x			x
H	x	20	42	x	x	x	x	x	x	x	
I	x	50	50	x	x	x	x		x	x	
J	x	25	2	x	x	x	x	x		x	
K	x	40	5	x	x	x	x	x		x	
L	x	20	20	x	x	x	x		x	x	
M	x	15	14	x	x	x	x		x	x	
N	x	30	10	x	x	x	x		x	x	
O	x	55	15	x	x	x	x	x	x	x	

Table 3. Characteristics of participant schools.

meaning of their experience. However, he also indicates “What are needed are not formulaic approaches to enhancing either validity or trustworthiness but understanding of and respect for the issues that underlie those terms” (p.31). In the current study, rather than using a series of three separate interviews to look in increasing detail at the experience of participants, I used a series of questions that mirrored the three phases of context, detail and reflection within a single interview. At the same time, the interviews were carried out in three phases, this enabled me to use data from the first interviews to identify details that could be given more focus in subsequent interviews with the aim of identifying how participant views might converge and interact, facilitating greater understanding through an analysis of a collective perspective (Azzam 2019). This scheduling also allowed for a reflection on emerging themes and patterns, together with a comparison of concepts with previous research. The process facilitated a development of understanding that not only provided insights into the concept of institutional legitimacy in

international schools but also reflections on how those insights might be of practical use within the context of international schools in Latin America.

3.3.3.1 Ethical Considerations

To comply with ethical considerations, the data for the study was collected following the British Educational Research Association (BERA) Ethical Guidelines for Educational Research (2018) as related to issues of consent, transparency, right to withdraw, potential harm, privacy and data storage and disclosure. Each participant was sent a Participant Information sheet (Appendix 1) and Research Participant Consent Form (Appendix 2) in anticipation of the interview. The participant information sheet provided basic information about the research project and about what participation would involve. It clarified the following:

- Participants had been invited because of their role as school head at an AASSA or Tri Association member school.
- Participation was completely voluntary and participants could withdraw their consent at any time without any need for explanation.
- There were no obvious benefits to taking part in the project but the information provided by participants could help to identify factors that could provide insight into the establishment of institutional legitimacy in international schools in Latin America.
- There were no obvious disadvantages to taking part in the project and participants should not feel any discomfort or embarrassment during the interview. In particular, participants were informed that should they be asked a question they did not want to answer, they could decline to answer without giving a reason.

It was confirmed with participants that only the researcher would have access to the information they would provide, and that all personal, identifiable data would be treated as confidential. Participant names or other identifying information would not be disclosed in any presentation or publication of the research. Participants subsequently signed the Research Participant Consent Form (Appendix 2) to indicate their full and free consent to participation in the project.

Data was collected on a digital recorder that was password protected. The researcher made transcripts of these recordings which were then stored on a password protected computer. No third parties were involved in transcribing the interviews and only the researcher had access to both the digital recorder and the computer. Field notes taken during the interviews were

collected and stored in a place where only the researcher had access and were not shared with any third parties. A copy of the relevant interview transcript was sent to each interviewee to validate that it was a true reflection of the conversation. Positive responses, verifying the validity of the transcripts, were obtained from all participants.

3.3.3.2 Format of the Interviews

According to Charmaz (2014), interviewers within the constructivist paradigm "emphasize eliciting the participant's definitions of terms, situations, and events and try to tap his or her assumptions, implicit meanings, and tacit rules" (p.95). Similarly, the hermeneutic interviewer regards interviews as "directed conversations" (Charmaz 1991:385) as opposed to sessions of stimulus and response, with the interviewer looking to lead the respondents to certain themes without directing them to express specific meanings. The interview is seen as a "textually produced construction of the interviewer and interviewee" (Patterson and Williams 2002:42) with interviewee responses being "emergent interaction[s] in which social bonds may develop" (Charmaz 2014:91). Following this model, an interview guide was developed to ensure that the interviews were sufficiently systematic to allow for a comparison and categorization of information between each interview, but remained flexible enough that themes could be pursued and explored as they emerged during the course of each particular interview (Patterson and Williams 2002).

A Project Information Sheet (Appendix 3) was given to each participant, outlining the objectives of the study. The Project Information Sheet included the following guiding questions giving participants the opportunity to reflect upon the issues involved before entering the interview:

1. *What aspects of a school do you take into consideration when judging how legitimate it is as an educational institution*?
2. *What aspects of a school do you take into consideration when judging how legitimate it is as an 'international' school*?
3. *What factors do you consider may influence perceptions of institutional legitimacy in schools, such as your own, within the broader international context*?

Ivey et al (2013) indicate that within an interview, ""what" questions often lead to a discussion of fact" while "how" questions lead to discussion of process or feeling" (p.118). The guiding

questions were designed as “what” questions, in order to lead participants towards the identification of explicit indicators of legitimacy (both tangible and intangible) rather than asking them to focus on their personal feelings towards these aspects of legitimacy. Nonetheless, during the course of the interview, “how” questions were used when it seemed relevant and appropriate to focus on individual perceptions of the subject under discussion.

The questions also move from a focus on the general concept of legitimacy as related to educational institutions, to a focus on international schools in particular, before zooming in on the interviewees’ own experience in schools within the Latin America region. This format was designed to follow, in loose terms, the context, details and reflection model of phenomenological interviewing identified by Seidman (2013). The first question was designed to set the context and allow participants to explore the issue of legitimacy in schools in general, the second question asked participants to identify the details that may impact upon their perceptions of legitimacy within the specific context of international schools, while the third question guided them to a reflection on how issues of legitimacy might impact upon their own specific experience. By using the phrase “schools such as your own”, participants were invited to make observations that were more specific without being asked to comment directly on their own specific institution. While the same semi-structured format of three open questions was used in each interview, additional questions were used in the Phase 3 interviews to further explore some of the themes that had emerged during Phase 1 and 2.

Interviews were scheduled taking into account the impact of time on the professional obligations of the participants. Both in-person and virtual interviews were designed to last 45 minutes to an hour. Participants were provided with a Project Information Sheet (Appendix 3) in anticipation of the interview in order to provide the basic context for the study. The Project Information Sheet included reference to Suchman’s (1995) definition of legitimacy and Bunnell et al’s (2016) observation about legitimacy being crucial to the success and survival of international schools. The Project Information Sheet identified the research objectives of the study and outlined the objective of the interview as being “to explore school heads’ views of institutional legitimacy at international schools in Latin America”. It also included the guiding questions that would be used during the interview. Approximately ten to fifteen minutes were spent at the beginning of each interview to review the Participant Information Sheet (Appendix 2) and Project Information Sheet (Appendix 3), ensuring that participants had sufficient understanding and had received enough information about the project to make a decision about their participation. Two participants (SH1

and SH2) referenced having researched the concept of legitimacy in anticipation of the interview, while others brought notes to the interview that indicated previous preparation. Once participants had confirmed their consent, signed the Research Participant Consent Form (Appendix 1), and indicated that they were comfortable with the interview situation, the interviewer began recording. This process allowed for effective use of the interview time and ensured that the information included within the recordings was focused entirely on the research objectives and guiding questions. Each recording was transcribed in full by the researcher and included within the subsequent analysis. Table 4 indicates which participant was involved in each phase of the data collection process, whether the interview was in-person or on Skype, and information about the length of the recording and the transcript.

Identifier	Type of Interview	Schedule	Length of recording (minutes)	Transcript (number of words)
SH1	In Person	Phase 1	33	3595
SH2	In Person	Phase 1	36	5311
SH3	In Person	Phase 1	29	3179
SH4	Virtual	Phase 2	28	1864
SH5	Virtual	Phase 2	35	3382
SH6	Virtual	Phase 2	45	3653
SH7	Virtual	Phase 2	43	5132
SH8	Virtual	Phase 2	38	3200
SH9	Virtual	Phase 2	48	3843
SH10	In Person	Phase 3	39	4196
SH11	In Person	Phase 3	43	5333
SH12	In Person	Phase 3	53	7155
SH13	In Person	Phase 3	48	5456
SH14	In Person	Phase 3	41	6599
		Totals	**559**	**61,898**

Table 4: Interview information.

3.3.3.3 Limitations of the data

A number of limitations were identified regarding the nature of the data. Firstly, the small number of participants means that generalisations cannot be made. However, the study does not aim to generalise in the sense of claiming that results would be similar in further studies but rather to generalise ideas "so that they can be applied in many contexts" (Suter 2012:353). The study is designed and carried out from the perspective that "ideas generated by a single-person or single-institution case study may be broadly applicable" (ibid).

The 'power asymmetry' of researcher and subjects (Seidman 2013; Charmaz 2014) is frequently referred to as a limitation within interviews, however, in this particular study, asymmetry was reduced as the researcher is also a school head at a school in Latin America and was therefore interviewing peers and colleagues rather than participants whose role is at a different level within the hierarchy of an organisation. Indeed, the researcher's professional acquaintance with the majority of the participants may have proven an advantage given that "For researchers using personal connections to informants as a means to recruit participants, relative intimacy and rapport with participants may enhance the generation of data in interview settings in ways not possible for 'outsider' researchers" (Roulston 2010:98)

The established relationship between interviewer and most interviewees also consolidated trust and contributed to a greater possibility of validity in the results. Interviewees were conscious that the interviewer shared a similar experience to their own and was therefore likely to have a high level of understanding of the complexities involved. At the same time, it should be recognised that this could also lead to certain assumptions, confirmation bias and blind spots in the analysis of the data. In order to avoid wider issues of reliability and validity, various strategies such as summarising, paraphrasing and checking were used throughout the interviews to ensure that the interviewer´s interpretations were as close as possible to the meanings intended by the interviewees (Kvale and Flick 2007).

The use of Skype as opposed to in-person interviews may have had some impact upon the data but there is mixed research regarding the nature of that impact. Lo Iacono et al (2016) review the research in this area indicating that for some, building rapport on Skype is seen as more challenging than in face-to-face interviews. However, for others, Skype interviews can be more "responsive and rapport was built quicker than in a number of face-to-face interviews" (Deakin and Wakefield 2014:610). Issues that can impact upon an interview carried out virtually include

a loss of intimacy owing to interference from technical difficulties, the fact that the “full range of postural, gestural and expressive movement that the body conveys” (Lo Iacona et al 2016:7) is not perceived and that, owing to the arrangement of camera and screen, it is difficult to maintain eye contact between interviewer and interviewee. In this particular study, most of these limitations were mitigated by the fact that rapport was already established through an existing relationship between the interviewer and interviewee and by the fact that in most cases, interviewees were also able to choose between a Skype and an in-person interview. Technical difficulties were only experienced in one interview (participant SH4) which was briefly interrupted on three occasions.

3.4 Data Analysis

After collecting data from phase one and two of the interviews, a process of descriptive coding was used to identify the topics that were emerging from the data. This first stage of the coding process was “open” in nature. Topics identified in phase one and two of the interviews were then explored in more detail in phase three with additional questions being asked about issues that had arisen in the first two phases of interviews. 85 topics were identified throughout all interview phases (See Appendix 4).

The topics from the interviews were synthesised into themes in a process that remained open to information emerging from the data but was also influenced by information from previous research such as the characteristics of premium and non-premium schools as identified by Bunnell (2019). Once themes had been identified, Bunnell et al’s (2017b) analytical framework for theorising the institutionalisation of international schools was used to identify “structural codes” (Saldaña 2013:84) that could be used to categorise the data according to the different elements of the framework:

1) The Regulative Pillar (RP)
2) The Normative Pillar (NP)
3) The Cultural cognitive pillar (CCP)
4) The Institutional Primary task (IPT)

This categorization allowed for the examination of “commonalities, differences and relationships” between comparable segments of the data (Saldaña 2013:84) and provided the

foundation for further reflection and a return to review of the detailed coding identified in the first phase. At this point, the categorization was elaborative in nature in the sense that theoretical constructs from a previous study were applied top down with a view to elaborating further, or refining those theoretical constructs, rather than being wholly grounded in the data.

Further analysis also identified how data could be classified in terms of the 'carriers' of the pillars of institutionalisation. This analysis enabled further comparison with the theoretical constructs from previous studies. A summary of the coding can be found in Table 5 and examples of the coding process in Appendix 5.

Level 1 Coding	General open topics, emerging from the data.
Level 2 Coding	Thematic codes emerging from a synthesis of the topics identified at Level 1.
Level 3 Coding	Structural codes based on the pillars identified in the "*analytical framework for the institutionalisation of International Schools"*
Level 4 Coding	Structural codes based on the carriers identified in the "*analytical framework for the institutionalisation of International Schools"*

Table 5: Coding

CHAPTER 4: RESULTS, ANALYSIS AND DISCUSSION

The results and analysis chapter is divided into 3 sections according to the research questions identified in section 2.8.6. Section 4.1 examines data related to Research Question 1, exploring the factors that participants identified as influencing their perceptions of institutional legitimacy regardless of whether a school is in the national or international sector. Section 4.2 examines data related to Research Question 2, exploring the factors that participants identified as influencing their perceptions of the legitimacy of schools that claim to be 'international'. Both section 4.1 and 4.2 are organised according to themes that emerged from the data. Discussion of the themes is framed within the context of previous research and Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools is employed to structure an exploration of detail. Section 4.3 explores Research Question 3 by summarising and organisation the findings from section 4.1 and 4.2 within Bunnell et al's (2017b) analytical framework. It identifies how each theme might be categorised according to the pillars of institutionalisation and the institutional primary task, and illustrates how that categorisation might contribute to an understanding of institutional legitimacy in the context of U.S. style international schools in Latin America.

4.1 Research Question 1: What factors do school leaders in U.S. style international schools in Latin America take into consideration when judging the institutional legitimacy of a school?

This section explores the factors that participants identified as influencing perceptions of institutional legitimacy that could be relevant to any school, regardless of whether it is in a national or international context.

4.1.1 Alignment with purpose

Bunnell et al (2017b) distinguish between the institutional primary task, and the goal, or 'mission' of an institution, observing that "The task defines what the institution is there to do," while "the goal (or "mission") is the outcome of that doing"(p.307). Data from the interviews suggests that the concept of the institutional primary task is not a familiar one to participants with none referring specifically to the concept of a 'task'. In contrast, nine participants made

reference to concepts such as ‘mission’, ‘vision’ and ‘purpose’, with the term ‘mission’ being the most commonly used (seven participants). In terms of legitimacy, participants emphasised the importance of aligning “organisational practices” (Bunnell et al 2017b:309) with the purpose of the organisation. For example, SH1 stated that alignment between the “*professed purpose*” and the “*actual outcome of that purpose*” is a “*big legitimacy issue*” while, SH8 and SH13 both observed that there must be alignment between what a school is going to “*deliver*” or “*achieve*” and what it says it is going to “*deliver*” or “*achieve*”. SH2 argued that schools that do not take the process of defining their mission and purpose seriously in the sense of “*identifying what it is they want to be, what kind of institution they want to be”* may be perceived as lacking in “*quality*”, observing that identifying and fulfilling the mission and vision are “*the things that make our school legitimate*”. SH12 put this succinctly by saying that schools must: *“Talk the talk and walk the walk”*.

SH7 observed that in order to be legitimate, the mission statement of a school must “*actually guide what you do*” and be “*rooted”* in the “*obvious growth and development of its learners*”. In more specific terms, SH14 identified alignment with activities such as curriculum and leadership as being key: *“Curriculum should be lined up with that mission and the leadership should be clearly guiding towards that clearly aligned curriculum”.* Similarly, SH3 observed that the existence of a strategic plan that is aligned with the mission and purpose gives a *“sense of legitimacy*” suggesting that a school is “*moving in the right direction.”*

In summary, the data from the participants seems to highlight the importance of “congruence” (Suchman 1995:573) as an indicator of institutional legitimacy. Participants expected to see congruence between the activities of an organisation and the expectations of that organisation as expressed in “*professed purpose*” (SH1), mission or vision statements. The fact that participants did not make direct reference to the primary task suggests that this is not yet a concept that is commonly used in schools.

4.1.2 Nature of the curriculum.

Fidan and Balci (2018) indicate that “organizations claim legitimacy by adopting normative, widely accepted features” (p.259). Data from the interviews suggests that in the context of a school, the most significant of these features is the curriculum. All participants referred to the concept of the curriculum during their interviews with most participants (ten of the fourteen)

indicating that to be considered legitimate, a school's curriculum must be planned intentionally and structured within a recognizable frame of reference. Indeed, SH13 was explicit about the need for a school to implement a 'legitimate' curriculum indicating that:

"*You have to have a legitimate program, recognized programs that are tested and tried and proven to do what they're supposed to do in terms of giving kids the skill sets they need in order to be successful.*"

SH4 made reference to the importance of structuring the curriculum by establishing "*learning outcomes"* that describe the knowledge or skills students should gain to ensure that "*the learning is purposeful and guided as opposed to like self-discovery*", while SH5 indicated that there should be "*a clear set of outcomes and expectations for the program that* [a school] *wants to offer to students*". Participants also indicated that to underline legitimacy, the learning outcomes cannot just be "*invented*" but must be "*based reasonably on some kind of understanding of developmental levels and research*" (SH4). Indeed, SH3 referred to "*adopted standards and benchmarks*" as an important indicator of legitimacy where the word "*adopted"* suggested that to be perceived as legitimate, the standards and benchmarks cannot simply be 'invented' or defined internally but must be imported from a recognized system such as the US Common Core. From this perspective, to be legitimate, a curriculum must be based upon established standards and benchmarks.

The emphasis placed on the establishment of standards and benchmarks indicates that these are an important symbolic carrier of both the normative pillar and the cultural-cognitive pillar. The standards and benchmarks not only establish what a student is expected to learn (normative pillar), but also what the school believes is important for the students to learn (cultural-cognitive pillar). In order to be legitimate, the standards and benchmarks must be representative of a recognised ´schema' for learning that is familiar to the participants. It is alignment with this 'schema' for learning that provides the sense of "stability and meaning" (Scott 2014:56) that subsequently promotes a perception of legitimacy.

SH12 noted that teachers, in particular, are likely to judge the legitimacy of a school based upon its curriculum and the way in which standards and benchmarks are used to support student learning:

"If they can't look at us and say well what curriculum do you use for this? And we can´t talk about the common core or the math standards, if we can´t talk about how our curriculum department works with teachers to do unit planning - if you can't do that well then I think teachers would question the legitimacy or the formality of the school."

Here, the way in which the participant describes teachers as expecting the *"curriculum department*" to work with them on "*unit planning"* indicates that in order to consolidate the normative pillar, there is an expectation that the curriculum is implemented through collective actions that ensure a coherent and consistent pedagogical approach. This would suggest that facilitating this type of collaborative practice in terms of "joint working on a clearly defined main task or primary task in a reflective way," (James et al 2007:542) would seem to have a positive impact upon perceptions of legitimacy.

In relation to Research Question 1, the emphasis on the need to provide a curriculum with clear standards that are in line with established norms would seem to suggest that from the perspective of the participants, the nature of the curriculum is central to the institutional legitimacy of a school.

4.1.3 Accountability.

Data from the interviews suggests that participants perceive accountability as a means by which schools can "seek legitimacy" (Kilikoglu and Kilicoglu 2019:5). SH12 indicated that while standards and expectations are a "*crucial*" symbol of the normative pillar, the question of how progress towards those standards is monitored is vital to perceptions of legitimacy. He indicated that it is vital to know *"are they* [students] *learning what they´re meant to learn and being able to do what they should be able to do as they progress through?"* and went on to observe that if activities such as student assessments are not aligned to the standards it is not possible to know if learning is "*really happening*". SH10 also indicated that "*you would want to look at student results, student performance to see if actually the curriculum is being taught,*" suggesting that student results are an artefact that must be reviewed in order to confirm whether or not a school is fulfilling its primary task. SH14 described a situation where a lack of a focus on accountability seriously undermined his perceptions of the legitimacy of an institution:

"*I did a visit to a school that was dreadful and seriously, there were no exams, the only exam in the K through 12 school was to provide the PSAT in 10th grade and the results weren't shared with the board so nobody knew anything - absolutely nothing… with the board I said, well, when you´ve had a graduation day and you think "Good, that's the end of a good year, do you remember that day? And they said yes - I said, well, what made it a good year? I don´t know - no idea, no interest, it seemed no interest or nothing that they could think about to structure it*."

This particular example seems to suggest that rather than a focus on "controlling individuals" (Kilicoglu and Kilicoglu 2019:5), the participant sees the notion of accountability as being relational and manifest in a sense of shared responsibility, with the expectation that stakeholders at all levels of the organisation are involved. Indeed, in this example, it would seem that the lack of engagement from the board is of more concern than the lack of student performance results themselves. This suggests that it is not sufficient for artefacts in the form of student performance results to exist if they are not shared with stakeholders, nor used proactively to measure progress and reflect on student learning.

In line with this, SH13 stressed the importance of implementing activities such as the use of protocols to ensure the effective analysis of student performance data. The use of these protocols means that the analysis of data becomes a "habit" or "repertoire of collective action" among stakeholders (Bunnell et al 2017b:311) that leads to a sense of mutual, or collective accountability:

"It's actually empowered all of our stakeholders to take an active role in the learning because you know the teachers have access to this data and so do the kids and so do the parents and so we identify different tools the kids can use at home on their own free time, the parents are aware of this so it then truly becomes a collaborative approach to accountability" (SH13).

The phrase "*collaborative approach*", together with the reference to stakeholders becoming *"empowered*", emphasises that the effective analysis of data is not an activity designed to 'monitor and sanction' within the regulative pillar, but a relational carrier of the normative pillar through which actors within the organisation take joint responsibility for achievement. This mutual accountability consolidates legitimacy by promoting the engagement of stakeholders in the institutional primary task and encouraging them to "*take an active role in the learning*".

While participants perceive accountability as crucial for perceptions of legitimacy, the reluctance of some participants to refer to standardised tests as influential factors suggests that while they recognised student performance data as important to the normative pillar, to place too much emphasis on results or to perceive them as a 'regulative' tool for monitoring and sanctioning could have a negative impact on perceptions of legitimacy. This tension between the regulative and normative pillars was reflected in a pattern of 'reluctance and recognition' by SH12 and SH13. They both expressed a reluctance to refer to standardised tests but then went on to recognize them as important:

"*I hate to say standardised testing and legitimacy because I don't like to focus things on that but I do think a school should be able to say to families how do we assess kids as they go through*". (SH12)

"*You´ve got to have results, you´ve got to have the data and again, I´m not such a tremendous fan of this but it is huge and it's a big part of who we are*". (SH13)

Participants acknowledged that being able to focus on student performance data from a normative rather than a regulative perspective is facilitated by the fact that they work in independent schools that can choose to use standardised tests as a means to improve student learning rather than being mandated to use them within a regulative system of control. SH14 indicated:

"We're not stuck on common core or state tests but we're driving that ourselves so our intention to get better is our own intention and our own desire".

This particular comment signals that the use of student performance data is seen as being related to internal expectations and values, rather than regulations from external authorities that may be used to monitor and sanction a school. This intrinsic motivation would seem to contribute towards a sense of legitimacy in that the data is being used for internal monitoring of progress, rather than a response to external demands.

Participants also indicated that using student results as a marketing tool to promote the school from a strategic point of view is also likely to be detrimental to their perceptions of a school's

legitimacy. For example, SH2 indicated a strong disagreement with the concept of school league tables as being symbolic of a school's quality:

"*That drives me nuts, you know, oh your school's been number one in the [] region for 12 years in a row - that means nothing, because you know what is the [] test? It's nothing.*"

SH10 also suggested that using test results for strategic marketing purposes is characteristic of a school that has not yet consolidated its legitimacy:

"Some of them that are new or fairly new and how do they develop legitimacy - they´re constantly publishing test results and that kind of thing - university acceptances, advertisements for new students, admissions information."

Here, the implication is that a school with an established, legitimate reputation does not have to resort to using student results as a marketing strategy, but a newer school that is seeking to establish institutional legitimacy may choose to do so. Ironically, the use of results in this way may undermine, rather than underline, perceptions of the school's legitimacy by manipulating perceptions in an instrumental way (Suchman 1995).

In summary, the data suggests that mutual accountability systems that highlight shared professional obligations (Bunnell et al 2017b) are seen as important carriers of the normative pillar that consolidate 'cognitive legitimacy' by ensuring conformance to "established models or standards"(Suchman 1995:589). In contrast, accountability systems that use standardised test results to monitor and sanction a school within an externally motivated regulatory system, or as a marketing tool to manipulate perceptions of reputation, are questioned. They may contribute to "pragmatic legitimacy" (ibid: 578) by demonstrating conformity with instrumental demands, but could also detract from the "altruistic ideals" (ibid: 589) of moral legitimacy. This, in a human-based organisation such as a school, could pose a significant risk to legitimacy.

4.1.4 Governance Structure.

James and Sheppard (2014) indicate that, "The way a school is governed has implications for the work of the school and the school's legitimacy as an educational institution" (p.16). In line with this, SH1 indicated that when a school's governance structure is clear and each actor

within the organisation respects the boundaries set out within that structure, legitimacy is likely to be strengthened. A clear governance structure contributes to a sense of "organizational legitimacy", producing "normative and cognitive forces" that "constrain, construct, and empower organizational actors" (Suchman 1995:771). Under these circumstances, each actor within the organisation is given the "*right to function without interference*" (SH1). SH12 indicated that a "*synergistic positive working environment*" between different levels of governance is an indicator of legitimacy, while a lack of synergy between the general director and the board can lead to stakeholders seeing a lack of coherence within the organisation that subsequently undermines institutional legitimacy. SH1 indicated that a board that oversteps the mark by "*micro-managing",* or one that "*overrides the director on issues that don't have to do with board purview,"* presents "*a problem for legitimacy, of their* [the board's] *sort of moral authority to govern*. Here, the reference to a perceived "*moral authority to govern*" is indicative of how a lack of clarity may influence pragmatic legitimacy in that stakeholders could perceive the members of the board as not having the best interests of the school at heart but being motivated by another, perhaps more personal agenda. This can detract from institutional legitimacy, not only in that it can create zones of "rivalry, conflict and division" (Caffyn 2018: 512), but also because conflicting agendas can divert attention from the institutional primary task. Indeed, SH13 described how important it is for the head of school (general director) to maintain a clear focus on the 'primary task' of student learning despite being pulled in different directions by the expectations and assumptions of board members who may not be educators:

"*it's not a power struggle or whatever but again these people that are not necessarily and not usually in the field of education try to impose their business beliefs or their artistic beliefs or whatever profession they´re coming from, but an education institution truly needs to be under the authority of educators, people who have made this their life, their passion"*

This example highlights the fact that while the establishment of a clear governance structure is an important element of the regulative pillar, the way in which actions and relationships are manifest within that structure are inevitably influenced by the cultural-cognitive expectations of individuals and their "varied and diverse individual experience, views, and expectations," all of which can become "powerful and emotional forces" (Caffyn 2018:506). The capacity to "skilfully and effectively steer the school and its reputation" (ibid: 512) between these forces would seem to be critical for school leaders and for the legitimacy of their schools.

4.1.5 Profit and Non-profit

Bunnell et al (2017b) state that "the case for arguing that being for-profit undermines the legitimacy of a school's claim to be an "International School" is not strong" (p.305). Nonetheless, nine participants expressed scepticism regarding the legitimacy of for-profit schools, indicating that when a school is constituted as for-profit, a focus on student learning as the institutional primary task may be displaced by the more "*pragmatic*" (SH4) purpose of financial gain. SH3 observed that while all schools, whether for-profit or not for profit, have to ensure sustainability and financial efficiency, legitimacy may be questioned if making a profit begins to influence major decisions and divert attention away from "*the best interests of the students*" (SH3). The participant went on to indicate that the legitimacy of a for-profit school may be questioned from a normative perspective, as "*there might not be the same transparency, the altruistic values coming from the board or leadership*" (SH3). SH10 also indicated that while many for-profit schools could be considered "*excellent*", the for-profit nature of an organisation may mean that the motivation for financial decisions could be questioned:

"*If you're in the business, you´re in it to make money and so I don´t know if you´re really reinvesting all of your resources in the education of the kids.*"

SH2 expressed a similar view, stating that "*I think that there are very few for-profit schools that I´ve seen that aren't business first and I think that's troublesome for me*". More explicitly, SH7 described for-profit schools as serving a "*different master*", suggesting that the primary task of this type of school is to make money and that the "*real master is profit*". SH7 suggested that the representatives of for-profit schools may argue that profit should be seen as an artefact, or outcome, rather than a purpose or primary task, but then went on to argue that if a school is constituted as a for-profit organisation, profit making is an undeniable element of their mission:

"So the profit thing, they would argue probably it's an outcome of a great school, I would say no, by nature that is the goal, their mission should read "in order to make money we will do this… we will deliver an excellent legitimate international education, but its goal is different."

SH1 and SH11 both referred to situations where the for-profit nature of a school may have undermined their perceptions of institutional legitimacy from a normative point of view in the sense that the actions of a school were not in line with the values, standards and expectations they have of a legitimate organisation. SH11 referred to:

"*Those schools that give private schools a bad name"* by being *"not transparent, they charge for everything, they run the operation themselves*".

SH1 also observed how some for-profit schools may "*talk about quality education but then you talk to the people within those schools and they say we don´t get the technology that we need, everything is penny-pinched*".

In contrast, SH13 gave the example of a for-profit school that is a "*gifted school with incredible facilities*" and where teachers are highly paid, and programs are "*wonderful*". However, the participant went on to state, "*I don't think I would ever work for a for-profit school*". This suggests that while the activities (programs) and artefacts (facilities) that carry the normative and cultural-cognitive pillar of the school promoted a sense of legitimacy, the participant could not personally 'relate' to the fact that the school was for-profit. It would seem, therefore, that the participant possesses an "archetypal structure" (Bunnell et al 2017a:6) that sees education as a vocation to which individuals are called. To work for a for-profit organisation would mean his identity as an educator might be compromised.

Nonetheless, not all participants were negative in their judgment of for-profit schools. SH5 argued that being for-profit or non-profit does not really influence a school's legitimacy "*one way or another*", indicating that the experience of teachers and students is not significantly affected in either situation. The participant argued that the fact parents knowingly choose to send their children to a for-profit school indicates an acceptance of the model that would suggest that if a school were to be transparent about its financial structure, even if it were for-profit, it should be considered legitimate. SH11 alluded to the fact that negative judgments of for-profit schools are related to cultural-cognitive frameworks that tend to highlight the altruistic nature of education indicating that there is a "*stigma attached to people earning profit off education, we don´t think people should earn a profit off education because it's not as altruistic as we think it should be*". SH8 questioned these assumptions of altruism, stating that the perception of a school as less legitimate simply because it is for profit can be deemed "*academic and intellectual snobbery*" and that:

"*You can get bad for-profit schools and you can get bad not for-profit schools. The fact that you want to make the school sustainable does not mean that it's not a very good school"*.

The participants' reflections on the profit or non-profit status of a school would suggest that this is a factor that can influence perceptions of legitimacy from a number of different perspectives. Firstly, participants seem to feel that being for-profit can lead to a lack of alignment between the professed norms and values of an institution and the actions that are implemented within the school. Secondly, from a cultural-cognitive perspective, working in a for-profit school may undermine the assumptions some educators have of education as having an altruistic purpose, leading them to question their own professional identity. Thirdly, the profit motive may displace the institutional primary task as related to student learning and undermine perceptions of the legitimacy of the school's 'reason for being'.

While the majority of participants indicated that they would question the legitimacy of a for-profit school, the lack of a consensus on the issue would suggest that this is a factor that is subject to personal interpretation rather than one upon which a generalised conclusion can be reached. It suggests the assumption that the for-profit nature of a school is an indicator of 'non-premium' status (Bunnell 2019) is one that could be questioned.

4.1.6 Summary.

With reference to Research Question 1, while the factors identified by participants as influencing their perceptions of the legitimacy of 'schools' in general can be related to all three pillars of institutionalisation, the data suggests that participant perceptions in this area are heavily influenced by the normative pillar and the manifestation of expected norms, standards and values. For a school to be perceived as legitimate the curriculum must represent established norms and standards, accountability structures must be normative rather than purely regulative, and governance structures must define clear boundaries and expectations within which individuals can work. In terms of the institutional primary task, the evidence suggests that the majority of the participants perceive a 'legitimate' primary task as one that is altruistic, with profit-driven motives potentially undermining that legitimacy. This also suggests that participants tend to judge the legitimacy of a school from a value-laden or "moral" perspective whereby a school is considered "valuable and worthy of support because its structural characteristics locate it within a morally favored taxonomic category" (Suchman 1995:581).

4.2 Research Question 2. What factors do school leaders in U.S. style international schools in Latin America take into consideration when judging the legitimacy of a school's claim to be "international"?

This section reviews factors that participants indicated had an influence on their perceptions of schools as being legitimately 'international'. Sections 4.2.1 and 4.2.2. explore how the nature of school leadership and the culture of the school might have an impact upon perceptions of legitimacy. The following sections review further themes that emerged from the data.

4.2.1 School Leadership

In an observation that has echoes of Suchman's (1995) definition of legitimacy, Hill (2014) observes that school leaders in international schools need to "negotiate the minefield of competing values and understand the social reality of its members" in order to ensure the "constructs of reality" are "proper" to individuals in international schools (p.176). That is to say, in order to establish institutional legitimacy, school leaders must develop a shared understanding of "reality" and establish a shared system of "norms, values, beliefs and definitions" through which the actions of the institution can be seen as "desirable, proper or appropriate" (Suchman 1995:574). In other words, school leaders must seek not only to understand the diverse cultural-cognitive perspectives of stakeholders, but to synthesize those diverse perspectives into a coherent whole, creating an orderly, stable and socially integrated pattern (Selznick 1996). This is a particular challenge in a leadership context that is "often filled with ambiguity and complex tensions between opposing forces" (Keller 2015: in abstract).

Data from the interviews suggests that participants are aware of the key role played by school leaders in establishing institutional legitimacy. SH1 identified the role of the general director as being "*huge within an institution*", while SH8 observed "*it's so much about the director".* SH7 emphasised that there must be a sense of "*congruency*" between the leadership and the mission of the school, indicating that the school leader should know, understand and represent the core values of the school in order *"to translate that into leadership and organisational structure*".

SH12 observed that the complexity of the relationships in international schools means that school heads are often faced with situations that may set one stakeholder group against

another. He indicated that rather than being tempted to validate all suggestions and trying to keep everyone happy (Keller 2015), to be seen as legitimate, leaders must sometimes make "*hard decisions*". He argued "*if we don´t stand up to parents at times, to teachers at times, to the board at times, I think that's also a sign of illegitimacy".* This suggests that while school heads may acknowledge and understand differing cultural-cognitive perspectives, they must also ensure that the norms and values of the institution are seen to override personal interests. This is particularly true within the governance structure of a school where, even if clear boundaries are established, the lack of a shared cultural-cognitive understanding may lead to conflicting priorities. For example, SH1 described a situation where pressure within the local context to perform well on national standardised tests, created a rift between the general director and the board with each having a different interpretation of the institutional primary task: *"I thought we were going to be in a dual program but the board is now saying, no, we need to really prepare kids for the national exam."*

SH11 and SH10 both referred to how different cultural-cognitive assumptions can impact upon the perceived legitimacy of school leadership as manifest in, for example, approaches to student behaviour. SH11 described how teachers with a background in the U.S. may have assumptions and expectations about the "collective repertoires of action" (Bunnell et al 2017b:309) that should be implemented in a school using a sporting metaphor to illustrate how teachers are often accustomed to a "*lock-step process"* for student discipline. They expect students to be managed on the basis of *"strike one, strike two, strike three, you´re out",* while the assumptions of school leaders may be that "*each child is going to be treated differently and is evaluated differently".* Such differences must be reconciled if all stakeholders are to perceive the related actions as legitimate. Using a similar example, SH10 observed that the transitory nature of expatriate teaching staff means that differences of opinion may be based on a lack of shared knowledge and consideration of individual student circumstances. While school leaders may make exceptions based on these circumstances, "*the American teachers don't understand that, they want everything black and white".* SH10 went on to indicate that she may, in fact, be reluctant to hire teachers directly from schools in Asia as experience indicates that these teachers may "*have a real hard time adapting to the Latin kids*". In this sense, she indicated that she may, in fact, choose her 'constituents' (Suchman 1995).

The high level of rotation of general directors within the international sector was also referenced by participants as having an impact on legitimacy. SH8 identified changes in leadership as

being a significant threat to legitimacy and "*one of the dangers of the international schools*", while SH12 referred to the risks of turnover, indicating that repeated changes can influence perceptions of institutional legitimacy by affecting the "*quality, organization and focus*" of a school. The suggestion is that a school with frequent turnover in leadership is likely to lack focus on its institutional primary task, and organisation in terms of the regulative and normative pillars. Indeed, SH8 noted that the lack of established processes and systems in many traditional international schools may lead to a sense of "*vacillation and change*" as changes in leadership affect changes in the direction of the school. In contrast, a school in which the leadership has remained constant can be reflective of "*quality and stability*" (SH12).

Evidence from the data indicates that the nature and style of leadership within a school is manifest mainly within the relational carriers of the pillars of institutionalisation influencing the identity and perceived purpose of actors within an organisation. SH11 and SH3 both stated that for a school to be considered legitimate, the leadership should be distributed throughout the organisation and not just manifest in a top-down hierarchical structure. In particular, SH3 indicated:

"*I think that schools that really involve teachers in their processes in their school improvement planning are more legitimate schools because in the end they're going to create the culture that is going to be thriving.*"

The implication is that a school with a top-down leadership style is likely to be perceived as less legitimate than one in which decisions are shared "*across the board*" (SH11). However, as Keller (2015) indicates, "It is important for leaders of international schools to understand that conceptions of leadership can vary greatly between different cultures" (p.909). SH10 reflected on this, noting that perceptions of legitimacy can be impacted by differences in leadership style with factors such as gender having an impact upon stakeholder expectations: "*at our school a lot of our leadership team are females so I think that makes a difference as well*".

In summary, maintaining a focus on the institutional primary task while negotiating the diverse array of stakeholder needs, desires and perceptions of what is proper and appropriate, is a significant challenge for school leaders in international schools. Understanding how the pillars of institutionalisation can support that focus would seem to be of significance. For example, is the issue one of 'regulation' with conflict arising over a lack of clear rules or is there a difference of

opinion based upon norms or standards? Having clarity in terms of which pillar of institutionalisation is involved, is key to identifying solutions.

4.2.2 School Culture

Caffyn (2018) observes that international schools are often subject to conflicting interests that can drain the energy of a school, affecting the leadership and damaging "both the political balance and social cohesion of the organization" (p.501). Caffyn emphasises the importance of creating a "positive school environment" (p.509) to minimize the risks of such conflicting interests, indicating that "a good working and learning environment, and the efficient communication and integration of all stakeholders" (ibid) are necessary for this to occur.

In terms of the data, SH2 and SH3 both made specific reference to a positive school environment as a key indicator of legitimacy. SH3 observed that:

"it would just be kind of like a general feeling when I´m going in classrooms you know, there are people greeting each other in the halls, there are students engaged in the classrooms - if I were to sit in meetings - are the discussions around the decision making, are they student centered discussions".

Here, the fact that students are "*engaged*" in their learning, and staff meetings and discussions are "*student-centered*", demonstrates a shared commitment to the institutional primary task. The "*greetings*" in the halls suggest that the repertoires of collective action are in line with a Western-based liberal philosophy that puts the student at the centre.

SH2 described a similar sensation, reflecting on how perceptions of legitimacy can be influenced by the fact that in some schools it is possible to "*immediately*" feel a sense of community and a culture that is characterised by a "*collective process*". The emphasis on "*collective*" indicates that a positive school environment is based upon relational systems that not only promote understanding but also the integration and synthesis of differing views.

Among other factors that can create a positive school environment, Caffyn (2018) identifies the "effective utilization of school buildings and space" (p.509). Here, the term "effective" suggests that to create a positive environment, buildings and space must be used in a way that is clearly

aligned with the institutional primary task. SH3 and SH2 both referred to the infrastructure of a school as having an impact upon their perceptions of legitimacy. However, while SH3 observed that 'first impressions' of a school's infrastructure may have a positive impact, he recognised that it is also a fairly superficial one and that opinions may change if subsequent information indicates investment in other areas is lacking. For example, after initially expressing how he had been impressed by the size and infrastructure of a school, SH3 observed that:

"There's a bit of a negative culture because they´re overworking their employees and there's just a sense of they want to grow and it's just about being bigger, bigger, bigger"

SH2 expressed a similar opinion, questioning the legitimacy of a school that had a state-of-the-art fitness centre but was lacking in terms of the resources needed to fulfil its academic programmes. This perceived lack of alignment between investment in infrastructure and the institutional primary task, may be symptomatic of the fact that a lack of financial expertise among international school leaders can lead to key financial decisions being deferred to business managers and board members (Macdonald 2008). Such decisions, taken from a business, rather than an educational perspective, pose a threat not only to the credibility of the school leaders (ibid) but to the legitimacy of the institution itself.

In relation to Research Question 2, while evidence from the interviews suggests that a positive school culture has a positive influence on school leaders' perceptions of institutional legitimacy, it could also be argued that it is the school leaders themselves who are critical to this culture. Indeed, it is incumbent upon school leaders to establish appropriate norms and expectations of professional behaviour, create effective channels of communication (Fidan and Balci 2018) and ensure sound financial management that protects the educational purpose of the school (Macdonald 2008).

4.2.3 Staff Demographics

In terms of the characteristics that influence perceptions of a school´s legitimate claim to be international, the profile of teachers is a critical issue (Hayden and Thompson 2010). Bunnell (2019) argues that having qualified teachers is an indicator of the 'premium' status of a school in the international sector, while Brummit and Keeling (2013) indicate expectations regarding the

nationalities of international teachers by noting that the vast majority of teachers in international schools come from the UK, New Zealand, Australia, South Africa, Canada and the U.S.

Within the current study, SH12 indicated that the qualifications of teachers are an important carrier of the regulative pillar in the sense that their certificates are artefacts that can be used to demonstrate legitimacy. He stated that "*parents that go to a school should be asking about - where do you get your teachers? What's the minimum requirement? What do they have to do to maintain their certification?*" Similarly, SH10 and SH13 emphasised that teacher qualifications must be aligned with the professional requirements of the areas (or subjects) that teachers are going to teach. SH10 indicated that while qualifications are important, schools must also ensure they have teachers who can "*actually go in and execute that curricular program that you are using*". In this respect, there is a recognition that the concept of a qualified teacher is a complex one (Hawkins and James 2018) and that while a teacher may be 'qualified' on paper, that does not necessarily mean that their training and experience are in line with the pedagogical requirements of an 'international' programme.

Data from the interviews also suggests that the 'international' profile of the teaching staff has a significant impact upon participant judgments of the legitimacy of a school's claim to be international. SH4 stated: "*If you´re a legitimate international school you should have a staff that reflects some level of diversity so that it's not just local hire teachers, but students are exposed to different educational styles".* SH2 went further, associating the notion of international-mindedness with the presence of international teachers:

"*That's part of the international-mindedness and the international experience, it's having educators coming from different walks of life, different cultures and bringing that to the school.*"

SH6 noted that while the percentage of expatriate staff may be an important indicator of institutional legitimacy, the decision of how many expatriate teachers can be hired in schools in Latin America may be controlled by national government regulations that impose a cap on visas. This may create tensions between a desire to consolidate the normative pillar through a fulfilment of the expectations of stakeholders and local, legal requirements that are needed to fulfil the regulative pillar.

SH10 identified two reasons why he considered having international staff important. One was to bring in "*new ideas and methodologies, new teaching practices,"* and the other was to help students develop an *"international and a bicultural understanding*". The reference to new ideas and new methodologies suggests that expatriate staff are associated with western, liberal philosophies and the capacity to implement progressive pedagogical approaches. SH11 also indicated that having expatriate teachers is important from the perspective of parents who value an "*American Style Education*" that is associated with critical thinking and open-mindedness. He compares this with "*more old-style didactic*" teachers who may have gone through local teacher preparation programmes. The suggestion is that having expatriate teachers contributes to international school legitimacy in that they symbolize the norms and expectations of the parent community. Emphasising this, SH11 noted:

"*If you were to take foreign hire faculties away, you would have a very different school, you would have a national school and you would have a very different clientele*".

In contrast, SH8 described how his school board has begun to identify the importance of hiring "*internationally minded staff*" as opposed to only expatriate staff, recognizing that teachers hired locally can also have the progressive, open-minded characteristics and mind-set of a teacher trained overseas.

In terms of the nationalities of expatriate teachers, SH2 identified expatriate teachers as mainly coming from English speaking countries such as the US, UK, Australia, New Zealand and Canada. However, SH4 indicated that only hiring staff from these countries is limited in terms of diversity, suggesting that to legitimise the school's status as an international school, faculty should be drawn from a wider range of countries. At the same time, the participant acknowledged that this diversity could represent a risk in that the primary task of developing bilingualism may prevent schools from hiring a more diverse range of teachers whose English may not be considered standard "*when that's one of the factors that we're sort of sold on*". SH13 recognised that some international school directors may be reluctant to take the risk of widening hiring practices to include candidates from a greater range of nationalities but indicated that this was a step he would welcome.

Regarding school leaders, SH3 indicated that having an expatriate general director "*creates a sense of legitimacy*" in that from a cultural-cognitive perspective, the nationality and academic

preparation of the general director could be symbolic of the school's international status. However, SH2 argued that while the nationality of the general director might project an image of legitimacy to the school community, it is, nonetheless, somewhat superficial: *"Having a gringo North American doesn´t make you legitimate as a director"*. Indeed, there is a risk that imposing a North American perspective may lead to the implementation of decisions that are not aligned with the local context and that, though in line with 'international' expectations, could undermine legitimacy at a local level. SH2 gave an anecdotal example of this, describing how in order to offer a wide variety of electives and increase the number of classes taught in English, an expatriate school leader eliminated various requirements established by the local Ministry of Education. This created a tension between the local and international contexts that represented a potential threat to the school's legitimacy from the 'regulative' perspective of the local authorities.

Data from the interviews would seem to indicate that the profile of teachers and of school leaders themselves is a significant factor that influences perceptions of international school legitimacy. While participants still hold an expectation that 'international' teachers are recruited from mainly 'Western' countries, there is also evidence to indicate that the emphasis on a specifically "international cadre" of teachers may be somewhat dated and something that belongs to the "old era" (Bunnell 2019:59) of international schools.

4.2.4 Student Demographics

Bunnell (2014) argues that using the student population as a criterion for identifying an international school is now "largely inadequate for describing the entire field" (Bunnell 2014:40). Nonetheless, data from the interviews suggests that participants still perceive schools with a higher percentage of expatriate students as more legitimately ´international´ than those with mainly host country student populations indicating that the nature of the student body is still a "substantive issue" (Bunnell et al 2016b:420).

In the current study, SH1 identified student demographics as one of the lenses people use to judge how international a school might be, while SH2 indicated that:

"*I think truly an international school is going to have a population that, and I wouldn't put a number on it but somewhere around 75% of the population should be diverse, it should be international, it shouldn't be host country.*"

The reluctance to specify a "*number*", suggests that SH2 recognises there is no hard and fast rule as to how many international students a school must have to be legitimately international. Nonetheless, the subsequent identification of a specific percentage reflects an internalised set of assumptions that is indicative of a strong cognitive framework regarding the nature of the student population in international schools. Indeed, the participant went on to indicate that student population is a factor that is becoming increasingly significant as "*a lot of schools are forced to accept more local students to stay sustainable*". Here, the word "*forced*" suggests that accepting local students is something a school does only if there is no other choice.

Comments from other participants reflected similar assumptions. SH10 observed that teachers will often judge a school's claim to be international based on the percentage of international students, while SH3 expressed the opinion that schools with only a 10% international student population cannot claim to be "*as legitimately international as*" those schools that may have 15-20 nationalities in a single classroom. Here, the comparative phrase "...*as legitimately international as...*" suggests that perceptions of student demographics are relative, and perhaps judged in terms of a sliding scale.

In relation to the wider context, the data suggests that judgments of legitimacy based on student population are, indeed, relative. SH9 noted, "*Latin America is perceived to be less international because so much of the student population is of host national*". This relativity seems to extend into the local context as both SH5 and SH1 identified their own schools as being more 'international' than other schools in the same country or region. SH1 indicated that in terms of student population, while his school would be "*within the five most diverse in terms of demographics*" in the Latin American region, were that same school, with the same demographics, be situated in a different part of the world, it would not be considered ´international' by many observers. SH1 also questioned the judgment of international schools in Latin America as being less 'international' as a consequence of the student population by referring to a "*double standard*" that leads to schools in Europe or Asia to be considered more 'international' as a result of the multiple languages spoken in the school. He described how European schools with students from different linguistic backgrounds are often judged more

international than a school in Latin America that may have students from countries as wide apart as Colombia, Argentina, Mexico or Peru. SH2 provided an illustration of this by suggesting that schools where English is a lingua franca are perceived as more 'international' than one where the students share a common language such as Spanish and 'elect' to learn English.

SH7 noted that in cultural-cognitive terms, it can be difficult for schools with a high percentage of host country students to maintain an international perspective, given that the "*local culture can override the broader universal values more easily*". On the other hand, SH8 indicated that it is not impossible to do so, observing that although the "*traditional*" view is that you must have international students, "*in today's world I think it is to do with the outlook of the school.*" Here, the reference to "*outlook*" suggests that the concept of 'being international' should not necessarily be related to the diverse nationalities in a school, but should be considered more of an approach or mind-set. From this perspective, while having an international student population may fit with an observer's expectations of an international school, it does not necessarily impact upon the legitimacy of that school's claim to be international. Reflecting upon this, SH8 stated that having an international student population is not a crucial aspect of a school's legitimate claim to be international as it is not something that is considered part of the school´s purpose or institutional primary task. She argued that a school's success does not rise and fall based on how many international students it has enrolled noting that:

"*We want a successful school and a successful school will be successful for whoever those people are, if they´re international good, but if we haven´t got them then we also need to be making sure that we´re providing a good level."*

Nonetheless, the word *"good"* still indicates an element of bias towards those schools that have a higher percentage of international students.

Other participants questioned the dichotomy between national and international student populations giving examples of students who may be local but are still representative of diversity. For example, SH13 described how:

"*There's a lot of diversity within the populations of each of our cities … there's different thoughts and different beliefs within similar cultures and so even though your kids are 80% local I still think there's a lot to learn about different types of views*."

Similarly, SH12 observed that in terms of their backgrounds, many host country families have had a significant amount of international experience and may, as such, bring an international outlook to the school:

"*We're heavily local culture but a lot of our local families studied in the States, they work in international companies and travel so that helps it become a bit of an international feel.*"

Some participants noted that even a school with a very low percentage of international students could be considered international if the programme provided by the school allows local students to be internationally mobile once they graduate (SH11. SH5, SH13). At the other end of the spectrum, SH14 described a situation where a school with a high level of expatriate students, and an ´imported´ national programme, could actually be perceived as an 'enclave' for foreigners that has "*no intention of becoming international".*

The persistent cultural-cognitive assumptions of an international school as being one that is made up of an international student population despite the reality of most international schools within the region is reflected in the fact that that student demographics is a factor around which there is little consensus. This lack of consensus is reflected in the following comment by SH10:

"*So that's a big argument there among the international directors because some say you can only be 40% national and others think that you could be 100% national and still be an international school"*.

In summary, and with reference to Research Question 2, the evidence would suggest that despite being considered an inadequate criterion for judging a school's legitimate claim to be international, there is still a lingering sense in the field that having an expatriate student population is indicative of a 'golden age' of international schools. An international student population is seen as part of "ideal" mode of activity that harks back to an "old era" (Bunnell 2019:61) that may trigger feelings of nostalgia and subsequently influence judgments of legitimacy.

4.2.5 Student outcomes

Hayden (2011) distinguishes between international schools that are pragmatic in orientation, with a programme that leads to "a widely recognised qualification that enables access to prestigious universities" (p.219) and those that are idealistic, focused on the development of values associated with international-mindedness. Data from the interviews indicates that participants view 'pragmatic' student outcomes as an important element of the cultural-cognitive pillar, with student results consolidating the legitimacy of a school in that they represent the school's capacity to 'deliver' its promises.

Ten of the participants observed that for a school to be considered legitimately international, student outcomes should be manifest in qualifications or credentials that allow students to be internationally mobile once they graduate from high school. SH8 observed that in terms of student qualifications, schools should have an "*international reach*", while SH4 indicated that "*from a credential point of view, to be a legitimate international school there would need to be a school that credentials should be clearly, widely accepted around the world".*

SH11 noted that while providing a programme that allows students to go anywhere internationally should be a basic tenet of any high school preparation, it is highly significant for schools in an international context and SH7 observed that students who receive an ´international´ education are likely to be motivated to pursue higher education opportunities outside their home country as they are more likely to be "*curious*", having had their eyes "*truly opened to the global world*". At the same time, SH10 indicated that the legitimacy of a school's claim to be international should not be judged on the number of students who choose to study abroad but rather on the potential to do so, "*they could, even if they don´t, they could*". Similarly, SH11 observed that the most important indicator of a school's success is not the number of students studying internationally but the capacity to "*get kids into universities of their choice*".

SH2 observed that while international schools in the Middle East and Asia may "*consider themselves a failure*" if their students do not pursue higher education in the U.S., this may not be a realistic goal for schools in Latin America where external factors may play a part in student decisions. For example, both SH7 and SH6 noted that decisions about higher education may be heavily influenced by the financial capacity of a student's family, while SH9 observed that the quality of higher education in the host city or country may also be a factor that needs to be taken into consideration:

"*Just because most kids in* [host city] *decide to stay in* [host city] ***doesn't mean that*** [name of school] *is any less an international school, it just means that* [host city] *has good universities. They could have gone to London School of Economics, or Harvard, or Stanford, they just chose not to."*

From this perspective, the provision of a 'blended programme' that incorporates elements from both the host-country national curriculum and an international and/or U.S. style curriculum is considered positive, expanding the options for students and allowing them more choice in their future destinations, Indeed, both SH6 and SH2 observed that by offering a dual or even a triple programme (IB Diploma, Host country Diploma and U.S. Diploma), the students are *"going to be leaving our school with a ton of options in terms of where they want to study, and I think that that's what we've tried to sell, and I think we've been very successful at it."*

In summary, data from the interviews suggests that participants see student outcomes as represented by artefacts such as dual national/international diplomas, as significant in terms of a school's claims to legitimacy. Indeed, rather than detracting from a school's status and undermining their claim to be a legitimate international school (Bunnell 2019), a blended, or dual programme would seem to consolidate perceptions of legitimacy. In addition, the participants seem to consider that providing students with both the opportunity to become internationally mobile and/or to have equal success in their home countries is indicative of international-mindedness and an inclusive perspective that respects the quality of education in the host country.

4.2.6 International Curriculum

In line with Bunnell et al (2017b), participants in the study recognised the implementation of an international curriculum, such as the IB, as being significant in the establishment of institutional legitimacy in international schools. In particular, they noted that the IB 'seal of approval' provides evidence of compliance with IB rules and regulations and, as such, is an important factor in the establishment of the regulative and normative pillars of institutionalisation (Bunnell et al 2017b). Both SH12 and SH5 recognised the importance of IB authorization as a symbol of legitimacy. SH5 stated:

"Schools that have IB programs, for example, you need to be certified or accredited by the International Baccalaureate organisation right and you would need to have met certain minimum levels of standards in order to obtain IB status". (SH5)

Similarly, SH6 recognised the symbolic importance of the IB saying:

"*Our flag is the IB, we are the only school in the city that offers the IB DP and there are only 3 IB schools in the country so that is our flag, I would say that is the factor that makes us different.*"

In this example, while the participant used the concept of the flag metaphorically, there is a recognition that displays of the IB mission and the school's authorization by the IB are, in fact, important artefacts that communicate the school´s legitimacy to stakeholders.

While participants recognised that the IB serves to consolidate the institutional primary task of a school in that it can give "*purpose and direction*" to a school's actions (SH14), data from the interviews also indicates that being authorized as an IB world school, and demonstrating compliance with the IB's rules and regulations, is not enough for an institution's legitimacy to be "taken-for-granted" (Suchman 1995:582). SH14 indicated that while the IB Diploma does, indeed, provide "*academic value*", it can also be done "*badly*" in that it could simply be treated as a set of exams. It is only if the programme is implemented "*properly*", and reflected in both the school's philosophy and pedagogical practice, that it can become a true *"indicator of legitimacy*" (SH14). This suggests that compliance with the requirements of the IBO in terms of the regulative pillar is not sufficient to confirm legitimacy and that these requirements must also be reflected in the "repertoires of collective action" (Bunnell et al 2017b:309) that constitute a school´s "*approach*" within the normative pillar. The importance of implementing actions that are aligned with the concept of the provision of IB programs as an institutional primary task, as opposed to simply 'flying the flag' of the IB, is referred to by SH12 who indicated that the assignation of a school as an IB World School can sometimes be questioned:

"I do wonder… sometimes I´ll see a school as an IB World School and I´m thinking, really? And maybe I don´t know the school but I often wonder, how can you do one thing but then you don't have certain other things? There's no accreditation with it."

Here, the reference to a lack of accreditation reflects the fact that while the authorization process implemented by the IB may be robust in terms of academic requirements, it may be less thorough than other school accreditation processes that focus on both the academic and organisational aspects of a school. The suggestion is that while being authorized to offer the IB may signal legitimacy in terms of a school's academic program, there could be aspects of institutional organisation and structure (a school's legitimacy as an employer, for example), that may still be in doubt.

Although SH12 indicated that the IB tends to carry more 'weight', within the international sector, SH7 indicated that IB status is symbolic of a particular cultural-cognitive framework that is no more valid than other alternatives, observing that the IB "*is a particular lens on the world and so just because you are international IB does not mean that you are any more international than other lenses on the world might be as well*". Here, the phrase "*just because*" questions the assumptions of the IB programmes as the 'gold standard' of international curricula, suggesting that while IB authorization may be perceived as having a higher status than other programmes, this status may not be wholly deserved.

SH3 also recognised that IB schools may be perceived as being "*on a higher pedestal"* than other, comparable institutions but indicated that it is simply a "*different approach*". The participant's subsequent use of the term "*elitist*" to describe IB schools and the emphasis on the ways in which schools have to make a significant investment or "*pay*" to join the IB "*club*", suggest that SH3 may perceive implementation of the IB as something that is strategically motivated, designed to increase the status of the school in marketing terms (Bunnell 2019), rather than a reliable indicator of the school's true legitimacy as an international institution.

A common thread in the interviews was that to be considered legitimately 'international' a school's curriculum must be characterised by high expectations that are internationally recognised. As such, the curriculum must incorporate a recognized set of norms and expectations (symbolic carrier of the normative pillar) and relate to a frame of reference beyond the host country national context (symbolic carrier of the cognitive pillar). SH8 indicated that there should be "*some kind of international benchmarking probably and some element within the curriculum that teaches beyond the national scope*". This concept of going "*beyond the national scope*" was echoed by other participants. For example, SH13 noted that to legitimately claim to be international, a school should offer "*at least a dual curricular program based on the*

home country national curriculum plus as well an additional curriculum model", while SH14 emphasised that a school that uses the name 'international' but does "*nothing other than just the set program - local program"* is doubtful in terms of its *"quality or value"*. Rather than depending upon a curriculum that is designed as specifically 'international' in nature (such as the IBDP), the reference to a dual program suggests there is an expectation that the curriculum is 'inter-national' in the sense of being derived from more than one national frame of reference. SH1 was explicit about this by stating:

"*I define ourselves as an American International School in the host country context with a dual program, mainly because the overall teaching strategies, structure and philosophy is very U.S. centric, international in terms of context."*

This example indicates that the curriculum, being U.S. centric, may not be designed to be 'international' but may gain that status by being 'transplanted' into a different national context. Indeed, SH1 indicated that the location of the school is significant in terms of whether or not a curriculum is considered international, observing that in its country of origin, a U.S. curriculum would not signal that a school is international. However, if that same curriculum were implemented in, for example, Brazil, it would.

Eight participants identified a number of alternative curricular programs as being valid indicators of legitimacy within the international sector, including the Advanced Placement Program and programs that lead to a US High School Diploma, which, according to SH3 is a "*huge factor for legitimacy of an international school*". The freedom and autonomy to choose from a range of programmes, or to provide choice within this range of programmes, was identified as a factor that could potentially differentiate a ´legitimate´ U.S. style international school from others within the field. SH7 identified "*choice*" as a "*core value*" and a central tenet of U.S. style education, indicating that providing choice for students within the curriculum is a significant symbolic carrier of the cultural-cognitive pillar. Similarly, SH2 observed that:

"When the kids do have a wider choice, whether they want to take a college prep track, whether they want to take AP classes or whether they want to take IB Diploma option or certificate. I think that is a differentiator in a lot of international schools."

At the same time, SH7 recognised that a curriculum based upon choice may seem to provide

less ‘depth’ than other programmes, with students taking “a *little dab in this and that and everything*”. Nonetheless, he emphasised that this choice is a key element or “*value*” of the cultural-cognitive expectations of a U.S style school where *“the child grows from who they will be, not from who society says they're going to be - a very American point of view.”*

SH3 also referred to the importance of choice, describing how after reviewing both the IB and the AP programs, the school’s conclusion was that the AP program was preferred for its “*flexibility*” and for the fact that the school would retain autonomy as opposed to “*having to follow exactly what IB is telling us to do in all these different subject areas”.* This autonomy, it was argued, allows students to *“have the freedom to specialise and choose what they want to study*”. SH5 also indicated that the AP provides freedom of choice in that it is “*an a la carte bespoke kind of thing, you can pick and choose the kinds of AP courses you want to enrol in*”. Nonetheless, implementing programmes such as the AP does not seem to influence a school’s identity in the same way as the becoming an IB World School might and, rather than being considered the primary task that underpins the institutional nature of the school, the AP programme is generally considered a tool that a school may use to achieve that task.

In line with this concept of choice and autonomy, SH12 referred to the provision of an “*eclectic*” curriculum as being important, indicating that within the international school environment, a school can develop its own curriculum from a variety of different sources with a view to meeting the differing needs of its students. Similarly, SH8 indicated that the curriculum in an international school can be “*far broader than UK, American, Russian, IB or AP or all of those things, I think a curriculum can be of the school itself*”. SH11 referred to a curriculum that is “*exploratory*” in nature with a “*broad scope of subjects”* while SH13 also described drawing upon a diverse group of sources, including the AP, IB, and Common Core to get *“the best that each of the programs has to offer*.” Recognising that this could represent a threat to legitimacy in that “*eclectic could sound like we don´t know what we’re doing and we just let teachers do whatever they want to*”, SH12 also noted that for such a curriculum to be valid, it has to be “*organized*” and “*carefully planned*”. Indeed, SH12 indicated that in the absence of a shared curriculum that characterises U.S. style international bilingual schools, the implementation of the U.S. Common Core Standards has facilitated a process of mimetic isomorphism, suggesting that the motivation for implementing these standards is not only to meet expectations for uniformity with U.S. schools, or to follow trends in the US (Mahfouz et al 2019), but to provide a sense of stability and continuity that can consolidate institutional legitimacy. SH14 also observed that

while developing curriculum from a variety of sources may be preferable to imposing the prescriptive requirements of a programme such as the IB, "*a certain professional sense*" must exist in order for it to work. Similarly, SH11 indicated, "*there has to be a degree of demand because I worry sometimes that kids will choose courses that don't demand as much from them*". Indeed, SH2 gave anecdotal evidence of a situation in which choice for students was increased through the introduction of a wide variety of electives and AP courses but at the expense of standards and expectations: "*I saw kids walking on stilts and that was an elective. To me, that wasn't a legitimate program."*

In summary, while participants recognised that providing an international curriculum such as the IB Diploma may contribute to international school legitimacy (Bunnell et al 2017b), cultural-cognitive expectations of choice and the possibility of providing an 'eclectic' curriculum that supports that choice, seem to significantly influence perceptions of legitimacy in U.S. style international schools. Indeed, providing a 'blended' programme that draws upon elements of host country national, non-host country national and international curricula, rather than signalling non-premium status (Bunnell 2019) may, in fact, be seen as "desirable, proper and appropriate" (Suchman 1995:583).

4.2.7 Pedagogical Practice

In terms of pedagogical practice, there is an expectation that schools within the international sector employ a student-centred, constructivist approach associated with a progressive, Western, liberal philosophy (Hayden and Thompson 2010; Hill 2014; Bunnell et al 2017b; Bunnell 2019). In terms of institutional legitimacy, these expectations represent the norms and values that form a "distinct mode of operation" (Bunnell et al 2017b:308).

Data from the interviews indicates that participants do, indeed, expect the actions of 'legitimate' international schools to be characterised by innovative and progressive pedagogical practices that are up to date with current educational research. SH3 noted that students "*need a different set of skills than they did several years ago so then if there are schools that are stuck with the traditional methods, I would question their legitimacy*". Other participants referred to the importance of concepts such as "*21st century procedures*" (SH3), "*progressive education*", "*international trends*" (SH9) and a "*teaching methodology and a structure that looks beyond the national boundaries*" (SH8). Indeed, SH2 indicated that "*you get more inquiry based learning in*

an international setting" with various participants making reference to expectations of international schools as implementing methodologies such as experiential learning (SH2, SH7), project-based learning, and Science, Technology, Engineering and Mathematics (STEM) (SH2, SH3, SH4).

SH13 referred to how specific practices such as "*filling in worksheets,"* or following a reading or mathematics program "*page by page*" are not considered appropriate or legitimate, while SH2 observed that a shared understanding of desired pedagogical practices is vital for perceptions of legitimacy, giving the example of how 'rigor', from a traditional perspective, is often associated with an "*industrial style*" classroom that has "*kids in rows and lots of homework*" while from a more progressive perspective it is simply perceived as a *"different level of expectation*". SH9 referred to classroom layout as being representative of a progressive, student-centred methodology saying, "*I can't think of a classroom in my elementary school that has a row in it - they just don't exist",* suggesting that the physical layout of a school must also be congruent with its pedagogical philosophy.

Mahfouz et al (2019) indicate that the standardisation of curriculum and instruction in 'U.S. international schools overseas' is more "paradigm" than "policy" (p.418), suggesting that the expectations of pedagogical practice are related to the normative and cultural-cognitive pillars rather than the regulative. Data from the interviews seems to support this by suggesting that the establishment of a coordinated and coherent pedagogic approach that is characterised by 'progressive' instructional strategies is an essential activity within the normative pillar but not one that is 'regulated' among schools. This presents a challenge in that in order to consolidate legitimacy and create an 'institutionalised approach' school leaders must focus on activities within the cultural cognitive pillar that provide structures of support and consolidate shared sense making. Bunnell et al (2016a) indicate that in a school that implements the IB programmes, the process of institutionalisation can be seen through the "learning and usage of a common pedagogical language" (p.13). However, in a U.S. style international school with a more eclectic curriculum and a focus on 'choice' this sense of a common pedagogical language and practice may be more difficult to achieve.

4.2.8 International Mindedness

The concept of international-mindedness is complex and difficult to define (Tarc 2018). Hill (2014) describes it as "an attitude of mind translated into actions in the school", describing these attitudes of mind as including international perspectives on events and global issues; respect for cultural and religious differences; the ability to speak at least one other language, and an awareness of "the interdependent nature of the world" (p.177). Bunnell et al (2016b) indicate that the concept of international-mindedness is an important symbolic carrier of the normative pillar, in that it is used to consolidate expectations in terms of standards, customs and practice (Bunnell et al 2016b, Scott 2014).

In terms of the data, SH2 argued that international mindedness is something that should be "*truly present in international schools*", while SH13 offered a definition, suggesting that international-mindedness is about the "*acceptance of ideas and divergent thoughts that maybe don't necessarily mesh with your own personal beliefs*". He described an international mind-set as one that is "*open to diverse beliefs, thoughts, practices and religions*" and went on to suggest that even in a "*local*" school, an "*international mind-set*" is possible.

SH4 and SH8 both took a more critical approach, referring to the concept of international-mindedness as being representative of an "*Anglo-Western*" perspective (SH4) rather than a truly 'international' point of view. Indeed, SH8 stated that:

"*When we talk about international education, actually what we're talking about is Western education and I think that's something else that actually puts in doubt the validity or legitimacy of the fact that we say international - in fact it's a very mono-cultural view of what the children should come out with, you know the idea of being a self-directed, independent, autonomous, you know those are very Western ideals.*"

With this, the participant seems to suggest that an international education, as it is currently understood from a cultural-cognitive perspective, is not so much an indicator of diversity, but more symbolic of a "new form of colonialism" (Emenike and Plowright 2017:6). The aim is to develop students whose skills and competencies (such as being self-directed, independent and autonomous) are those that are valued by Western societies. This, it is suggested, may represent a threat to the validity and legitimacy of international schools, in a context where neo-colonialist tendencies are increasingly being brought under scrutiny.

Other participants (SH1, SH2 and SH11) avoided the complexities inherent in the interpretation of international and international-mindedness by describing their schools as "*bi-cultural*" and/or "*binational*" rather than specifically international. While this means they are still international in terms of being non-national (a U.S. style school beyond the borders of the U.S.) or perhaps 'inter-national' in the sense of providing a dual programme from the U.S. and the host country context, the term bicultural seems to provide a more accurate description of their identity that allows for greater alignment between the carriers of institutionalisation and the school's institutional primary task. Again, it would suggest that rather than seeing a dual or blended programme as indicative of 'non-premium' status (Bunnell 2019), this duality may, in fact, be desirable and indicative of an inclusive and enriched educational approach.

Within the context of international-mindedness, SH7 explored the notion of diversity as a "*core value*" making a distinction between the "*European lens on the idea of diversity*" and the "*American view of diversity*". The European view, the participant argued, is one that focuses on cultural differences in terms of manifestations of traditions and national characteristics, and is "*very much rooted in the idea of tolerance*". In this context, to be international is to have a knowledge and understanding of another culture, but at the same time, to remain distant and distinct. In contrast, SH7 argued, the U.S. perspective of diversity is that it is something to be embraced, something that "*sustains and enriches life*". From this perspective, diversity is not the inclusion of different cultures in a loosely linked network, but the synthesis of different cultures into a new whole. The suggestion is that the cultural-cognitive expectations of what it means to be diverse in a U.S. style international school may be different from those of a European context.

SH13 noted that among the challenges faced by international schools is the fact that tensions may exist between the 'pragmatic' and 'idealistic' (Hayden and Thompson 2010) dimensions of internationalism. In particular, he observed that parents may choose an international school because it represents prestige and the acquisition of social capital (Waldow 2018) but may be resistant to the school's interpretation of international 'values'. Indeed, parents may "*shut down right away*" when they are confronted by perceptions and beliefs that are significantly different from their own, reverting to their "*own personal beliefs and personal values which are sometimes not in alignment with truly being an international school*". SH4 also reflected on how the "*ideological international aspect*" of a school may come into conflict with the pragmatic

aspect of preparing students to be internationally mobile or getting a job. This, he argued, could eventually lead to a questioning of legitimacy in terms of being international, but "*not necessarily in terms of being a good school*".

With reference to Research Question 2, the shifting nature of terms such as international-mindedness and diversity may present a challenge to the establishment of legitimacy and for this reason, their definition would seem to be "highly significant to school leaders" (Tarc 2018:487).

4.2.9 Bilingualism.

Bunnell (2019) indicates that "schools delivering a non-national curriculum in English outside an English-speaking country" is the "core-defining dimension" of international education (p.2). However, he distinguishes between the "old era" (p.61) assumptions of international schools where English was the sole language of instruction, and the "new era" realities in which the school's programme is often bilingual. At the same time, Fitzgerald (1955) indicates that bilingual American schools have been in existence in Latin America since the 1940s, suggesting that there is little that is 'new' about schools offering a bilingual programme in this particular region.

Data from the interviews indicates that the provision of a bilingual programme is an important element of the institutional primary task of participant schools and one that many participants relate to the cultural cognitive concept of ´being international'. SH4 indicated that "*Learning a second language that's outside of your culture I guess is a major part of international mindedness*", while SH10 indicated that "*I think that you would have to offer a bilingual program - not necessarily English but you´d have to offer at least two languages*". While both participants suggested that to be an international school there is no expectation that English must be the target language, the data does suggest that within U.S. style international schools in Latin American, "*English is key*" (SH9) and a significant part of a parent's decision to choose that type of school for their child. SH10 observed that instruction in English is an important factor influencing parent choice, while SH4 indicated that parents recognise being proficient in English will give their child advantages in their future career, seeing "*English as the language, the lingua franca of international commerce and higher-level education".* In line with this, SH2 observed that the offer of a bilingual education can be used as a strategic marketing tool to attract

potential ‘clients’ to schools commenting that “*We really sell our school and the fact that the students are going to be leaving the school as bilingual speakers.*”

Other participants indicated that the strategic use of bilingualism presents a challenge to legitimacy in that a large number of schools in the region claim to be bilingual but have little to justify that claim. SH12 and SH9 described how national government regulations requiring all schools to become bilingual in their countries have resulted in an explosion of schools whose legitimacy may be questioned. Indeed, SH9 referred to a situation where schools that were previously considered legitimate are now being questioned, describing how one school that previously had a “*great reputation within the city*” is now considered a “*joke*”, given the fact that it claims to be bilingual but does not have teachers who are proficient in English.

SH12 referred to the difficulties of defining what an effective bilingual program might be:

“*There are a lot of schools, we’ve seen it in [host country] where they all say they’re bilingual, you know, how do you determine that? What is someone putting behind their legitimacy?*”

Similarly, SH14 referred to the importance of implementing accountability structures that can justify a school’s claim to be bilingual:

“*If you´re talking about being bilingual, then we should know what we mean by being bilingual - what kind of levels they should be achieving and their capacity for it.*”

All of this would suggest that much in the same way that there may be regulative, normative and cultural-cognitive expectations for an international school (Bunnell et al 2017b), there are also regulative, normative and cultural-cognitive expectations for a school that claims to be bilingual. These might include appropriately qualified and certified teachers (regulative pillar), established standards of language proficiency (normative pillar) and a shared concept of what it means to be bilingual (cultural-cognitive pillar).

4.2.10 Bicultural/Multicultural context

Bunnell (2019a) argues that routines and rituals in international schools, such as the “numerous Fs” of “food, fashion, flags, and folklore” represent “visible, tangible aspects of a school’s

culture" (p.10) that help to "develop organisational identity and a sense of institutional legitimacy"(p.16). Such routines and rituals are carriers of the cultural-cognitive pillar that can help to consolidate perceptions of legitimacy by having "emblematic or representational significance" of the international nature of the school (Bunnell et al 2016b:419).

SH14 described how legitimate U.S. style international schools frequently display the U.S. flag alongside the host country flag and sing both US and host country national anthems during student assemblies. SH10 also described how traditional events such as Thanksgiving and Halloween may be celebrated alongside host country traditions such as carnival. However, she also indicated that this can represent a challenge to legitimacy in that while these activities may consolidate the multi-cultural identity of the school, without a shared understanding of their significance, such celebrations may also be regarded as representing a loss of instructional time and a distraction from the primary task of student learning.

While the "numerous Fs" are often dismissed as being superficial representations of 'culture', (Bunnell 2019a), they can also provide "a deep and powerful institutionalising force" (p.15), that can facilitate the development of international-mindedness and thus consolidate the institutional primary task. Ensuring that these activities, artefacts and events consolidate institutional legitimacy and organisational identity through the cultural-cognitive pillar would therefore seem to be significant and an aspect of school culture that school leaders should not dismiss.

4.2.11 Accreditation

Accreditation is an important symbol of the regulative pillar that contributes to institutional legitimacy by representing compliance with rules and regulations. Bunnell (2014) notes that the lack of accreditation in the international school sector "seriously undermines the control and monitoring of quality assurance" and potentially allows the unethical treatment of teachers to go unmonitored (p.126).

Participants in the study identified accreditation from external agencies as an important factor in relation to the establishment of the regulative pillar. While some recognised that, first and foremost, schools must be certified or licensed by the authorities of the host country (SH13, SH5, SH6, SH12), most also indicated that to be considered international, this local certification or license must be supplemented by accreditation from another, international organisation.

Indeed, while there is a recognition that host country certification is important, there is also an indication that in some countries, local certification may not be as rigorous as it should be and may be disregarded as a symbol of legitimacy. For example, SH9 referred to the concept of "*garage schools*", giving anecdotal examples of the local Ministry of Education assigning a license to function to a school that is simply a converted garage. As a result, SH9 indicated, "*If someone tells me they´re accredited or endorsed by the Ministry of Education - so what*?"

SH10 and SH6 defined accreditation by an international organisation as a 'seal of approval' that acts as a symbolic carrier of the regulative pillar. However, there was also a sense that simply having this symbolic seal of approval and displaying artefacts such as an accreditation certificate are not sufficient to guarantee legitimacy. Indeed, SH2 stated:

"I know what legitimacy isn´t and I think that's super important - I know that having your AdvancEd certificate on the wall doesn´t make you legitimate, I know that".

Evidence from the interviews suggests that the nature of some accreditation systems, from the perspective of the participants, has shifted, and accredited schools are no longer considered the "*torchbearers*" (SH9) they once were. SH12 and SH2 suggested that this is the result of some schools using the accreditation process as a marketing tool to establish strategic legitimacy, rather than as a carrier of the regulative pillar. For example, SH2 stated:

"I think a lot of these schools that are just churning out accreditation certificates just for the piece of paper and I'm not sure that they are high quality you know, and so it's troublesome to me" (SH2).

Six participants also suggested that the accreditation process itself has changed, shifting from a focus on compliance to a focus on school improvement. As a result, it is argued, the process may not be as rigorous as it once was, with schools being rewarded for their work towards standards as opposed to the achievement of those standards. SH9 described how "*the initial benchmark doesn't seem to be as high as maybe it once was and then everything from then on in, after initial accreditation is based on how well they've done such a good job in turning this round*". SH10 noted that with the focus on improvement rather than on compliance, accredited status can now be assigned to a wider range of schools and that there is "*a differentiation there between a school that's just meeting minimum standards and those that have gone beyond*

that". The reference to accreditation as an indicator of minimum standards, as opposed to an indicator of high quality, was echoed by SH11:

"*It's gone to a minimum level and not to something that we aspire to show that you´re better than others .... Now it's just the bar is so low.*"

Similarly, SH9 and SH14 both referred to schools having received accreditation status that they believed should not have done so. Nonetheless, while the quality of the accreditation process itself may be questioned, the validation it assigns is still important. Not having accreditation "*would be a real strong sign that you're not legitimate because if almost everybody can get accredited and your school is not, then that puts up a big red flag*" (SH2).

The analysis of participant comments related to accreditation indicates that while accreditation remains an important symbolic carrier of the regulative pillar (Bunnell et al 2017b), it can no longer be taken for granted as a marker of distinction. The growth of accreditation to incorporate schools that participants perceive as 'non-premium' (Bunnell 2019) suggests cultural cognitive assumptions about accreditation as a "*gold standard*" (SH9) may be being eroded. Indeed, SH13 sees it as a "*bottom line*" without which the legitimacy of a school would definitely be questioned. For school leaders, who are often held directly accountable for accreditation, ensuring that the accreditation process itself is perceived as legitimate is potentially more important than receiving the accreditation certificate itself.

4.2.12 Networking

Bunnell (2019) indicates that being a member of a professional network of schools is an indicator of 'premium' status while being non-networked is indicative of 'non-premium' status (p.73). While it might be assumed that, as general directors of member schools of AASSA and/or Tri-Association, all participants value membership of professional organisations, SH13 was explicit about how being a member of these groups and participating in activities such as shared professional development is important to legitimacy in that it can be symbolic of "*efforts to be a quality school*":

Another aspect of networking that seemed significant for participants is the possibility such networks represent for students to participate in activities, events and cultural exchanges. For

example, SH4 referred to students being "*exposed to different cultures and countries through international partnerships*" and SH5 indicated how being able to offer students "*networking connections*" that give them an "*international experiences*" may be something that schools within an international network may be able to provide. SH8 also observed that "*exchange visits*" and systems of communication that represent learning beyond the host country are indicative of an "*international reach*" that legitimises a school's claim to being international.

For school leaders, networking in terms of making connections through professional associations not only consolidates legitimacy for an organisation but can also provide an important support structure that contributes to their own capacity for 'resilience' in what is frequently seen as a precarious environment (Bunnell 2019b). By developing professional relationships with other school leaders in similar institutions, they are able to consolidate the cultural-cognitive pillar of their own institution by making sense of the context and learning from the experience of others.

4.2.13. The school as an employer

Bunnell (2016, 2018) indicates that the international school sector can represent a 'precarious' workplace in which the labour rights of both teachers and administrators may be at risk. This lack of security and stability can result in "an environment that is conducive to insecurity, fear, and resentment" (Bunnell 2018:560) and can pose a significant threat to legitimacy particularly when those insecurities and fears are aired on social media (Deephouse et al 2017; Bunnell 2018; Bunnell 2019).

SH3 observed that issues such as the structuring of salaries and benefits could have a significant impact on teacher perceptions of legitimacy, with teachers judging a school in pragmatic terms: Does the school value me as an individual? Does it have my best interests at heart? He noted that:

"*If a school is not offering a salary that is able to provide a lifestyle that a foreign hire teacher might feel comfortable with, that would kind of influence legitimacy.*"

The suggestion is that an insufficient salary package not only impacts upon individual teacher perceptions of legitimacy but also that of external observers of the school. A school that does

not have a salary structure that can attract expatriate teachers is unlikely to be considered a legitimately 'international' school.

Participants also noted that salaries and benefits are an area in which schools in Latin America may be perceived unfavourably in comparison to international schools in other regions, with Latin America as a whole being considered a 'Tier 2' location, or the "*poor little sister*" (SH10) in comparison to other regions. SH11 specified how recruiting from other regions may be difficult considering candidates are likely to have a salary that is "*more than double, sometimes three times as much as what we offer*". Similarly, SH3 indicated that there are "*certain regions that might feel more elitist because of their region and because of the size of the schools and the infrastructure and the salaries you hear about*". However, the qualifier in the phrase "*might feel*" implies that the participant sees this as a claim that cannot really be justified but is likely to be based on a lack of knowledge of the region.

Other participants indicated that while salaries and benefits may be significant, with schools that pay well being considered more *"ethical*" (SH8) than others, there is still the possibility that teachers can be "*well-treated and badly-treated for lots of different reasons*". Indeed, SH12 indicated that from the perspective of expatriate teachers, a concern for wellbeing could be more significant to perceptions of legitimacy than the amount teachers earn, with the expectation that schools will help expatriate teachers manage issues such as housing, bank accounts, visa etc. A school that does not give this type of support is likely to be questioned in terms of its "*legitimacy, its formality, its organisation, its understanding of being an international teacher and the needs expats have.*"

Another challenge to legitimacy in U.S. style international schools in Latin America is found in the disparities in benefits between expatriate and local teachers. Indeed, SH13 observed that a differentiated salary and benefits system might not be in line with the norms and values of an 'international school'. Working in international schools often places expatriate staff in a privileged position as they are assigned a higher salary and benefits package than that offered to local staff. Caffyn (2018) describes how these "polarities" between locals and expatriates can "divide and generate rivalry, conflict and division" (p.512). Indeed the dual salaries and benefits system could be interpreted as reinforcing ´colonial´ values that potentially undermine a school's claim to 'international-mindedness' and associated values. Reflecting upon this issue, SH11 made reference to a "*dual market system*" that means schools are required to offer higher

salaries to expatriate staff in order to attract teachers from their home country. He indicated that "*If you were able to pay locals and foreign hires at the same level, you would have to charge such a high tuition that you wouldn't be sustainable*", suggesting a need to balance the financial risks to the school with the threats to its claims to be 'international'.

The importance of the actions of the school as an employer would seem to emphasise the need for school leaders to be cognizant of the business-related aspects of running a school. Indeed, as Macdonald (2018) observes, while it may seem "counter intuitive" (p.52), it is important to ensure that school leaders have a clear knowledge and understanding of school finances if they are to "maintain their educational focus" (ibid). That is to say, it is the responsibility of the school leader to ensure that school finances are aligned with the institutional primary task.

4.2.14 Summary

With reference to Research Question 2, while the factors identified by participants as influencing their perceptions of a school's legitimate claim to be international can be related to all three pillars of institutionalisation, the observations seem to place more weight on the cultural-cognitive pillar than on the regulative and normative pillar. Rules, regulations, norms and standards may all be established, through, for example systems of accreditation or policies and procedures within a school, but if stakeholders do not have a shared understanding of their importance, or do not understand the reasons why they have been put in place, perceptions of institutional legitimacy are likely to be undermined. Creating this shared understanding is vital for school leaders.

4.3. Research Question 3. How might the analytical framework for theorising the institutionalisation of international schools (Bunnell et al 2017b) contribute to an understanding of institutional legitimacy in the context of U.S. style international schools in Latin America?

The following section summarises the results and organises the findings from sections 4.1 and 4.2 within the analytical framework for theorising the institutionalisation of international schools (Bunnell et al 2017b). Placing the results within this framework consolidates an understanding of the role each factor might play in the establishment of legitimacy in U.S. style international schools in Latin America and allows the results from the current study to be compared with the

concept of ‘premium’ and ‘non-premium’ schools as identified by Bunnell (2019). In order to organise the findings within this framework, it is important to have a clear understanding of what the institutional primary task of U.S. style international school in Latin America might be. The following section suggests a possible definition based on data from the interviews.

4.3.1 The Institutional Primary Task

Data from participants suggests that, from the perspective of school leaders, the institutional primary task of U.S. style international schools in Latin America should include bilingualism and the provision of a blended, or bi-national curriculum that goes ‘beyond’ the scope of the host country, balancing both the ‘pragmatic’ and the ‘idealistic’ aspects of being international. Rather than seeing a curriculum that blends both national and international elements as being indicative of a ‘non-premium’ school (Bunnell 2019), the combination is seen as positive in that it represents a benefit for students with the fusion of elements meeting their needs and potentially being more ‘inclusive’ and culturally responsive than a purely U.S. or U.K. based curricula. The institutional primary task of US style international schools in Latin America could therefore be defined as follows:

To provide a bi-national, bilingual curriculum that promotes international-mindedness and that provides access to further education in both national and international contexts.

4.3.2 The regulative pillar

Within the regulative pillar, participants identify accreditation and/or authorization by external bodies such as the IB or another accreditation organisation as essential to a school’s legitimacy. They also indicate that clear structures of governance, and effective systems of control should be evident within a school.

At a symbolic level, while participants do not focus specifically on authorization from the IB as a requirement, they do indicate that authorization to offer programmes from the IB and/or organisations such as the College Board, contribute towards the legitimacy of a school. Similarly, participants identify accreditation by a U.S. accreditation organisation as symbolic of compliance with the rules and regulations expected of a U.S. style international school. However, the data also suggests that the expansion of accreditation organisations to

incorporate a wider range of schools may lead to a reduction in the perceived value of accreditation as a differentiating factor. Indeed, the data suggests that it will become increasingly important to validate the legitimacy of the accreditation process itself, as a shift away from accreditation as a marker of compliance with established standards, towards its use as a school improvement tool may bring the legitimacy of that process into question.

Having a governance system that is characterised by clear goals and well defined boundaries, is identified as a key factor within the regulative pillar and significant in terms of perceptions of legitimacy. The data suggests that for school leaders, being able to function without interference, particularly in terms of maintaining a focus on the institutional primary task is vital to institutional legitimacy. This would appear to include ensuring that the institutional primary task is not displaced by a focus on 'profit' or an emphasis on student performance on standardised tests.

In terms of systems for monitoring and sanctioning, the data seems to suggest that in U.S. style international schools in Latin America, while systems of control should be clear, school leaders are also likely to consider community and context when implementing rules and regulations. Relationships between stakeholders are not perceived as simply transactional but reflective of 'family' connections and influenced by the "collectivist" nature of Latin American culture (Hofstede et al 2010). This can represent a challenge to school leaders who need to balance the "collectivist" expectations of the local culture where "relationship prevails over task" (p.124), with the more "individualist" expectations of stakeholders from countries such as the U.S. where there is a sense that task should prevail over relationship (ibid).

In terms of artefacts, all the schools in the study use certificates and logos to indicate accredited status and/or authorization by the IBO. However, there is evidence to suggest that from the perspective of school leaders such certificates and logos alone are not enough to confirm the legitimacy of a school.

In summary, while the carriers of the regular pillar of institutionalisation of U.S. style international schools in Latin America are manifest at a conscious, visible level, (Scott 2014, Bunnell et al 2016a, 2017b), evidence from the interviews suggests that perceptions of these carriers are influenced by the cognitive-cultural assumptions of the participants.

4.3.3 The Normative Pillar

Many of the factors identified by the participants as related to the normative pillar are also similar to those identified by Bunnell (2019) as characteristic of a 'premium' school. Participants indicate that schools must be held to account and able to validate their success through measurement against external standards. At the same time, accountability must be mutual and internally motivated rather than driven by external forces.

Similar to the expectations of a 'premium' international school, evidence from the interviews suggests that at a symbolic level, U.S. style international schools should be characterised by values related to 'international-mindedness' and concepts such as diversity and equity. However, evidence from the interviews suggests a growing concern with the Anglo-Western emphasis inherent in many of these terms.

A key difference between Bunnell´s concept of 'premium' schools and the participants' perceptions of legitimacy in U.S. style international schools in Latin America lies in the concept of a 'blended' curriculum. For the participants, while evidence of adherence to U.S. based standards and benchmarks is vital, a fusion of elements between host country and U.S. based curricula is a necessity and a requirement of local education. According to the participants, such a combination does not detract from the quality of a school nor from its legitimate claim to be international.

Having qualified teachers that represent the norms and values of the school and the capacity of the school to fulfil its 'promises' is a key factor in perceptions of institutional legitimacy. Both Bunnell (2019) and the participants suggest that having international teachers, trained in student-centred pedagogical practices is significant. Nonetheless, the data from some participants suggests that the binational and bicultural nature of schools in Latin America means that it is also important to employ local teachers who have a clear understanding of the local cultural context. Differences in pedagogical background and training between local and international teachers may create challenges in terms of implementing a coherent, pedagogical approach but perhaps more significantly, may serve to counter the western bias in the cultural norms and expectations of 'international' schools that may ultimately undermine their legitimacy.

In summary, while the data suggests that specific characteristics such as U.S. based standards might contribute towards a school's legitimate claim to be a U.S. style international school in

Latin America, there is also evidence that the traditional emphasis on Anglo-Western norms and values is being increasingly questioned. The evidence suggests that participants see a blend of host country and U.S. based expectations as consolidating rather than detracting from legitimacy.

4.3.4 The cultural-cognitive pillar.

Factors related to the cultural-cognitive pillar seem to be the most significant in terms of school leaders' perceptions of legitimate claims to be a U.S. style international school in the Latin American context.

In symbolic terms, rather than one specific curricular programme being typical of a U.S. style international school, participants placed emphasis on providing a significant level of choice for students within that curriculum suggesting that this may be a specific characteristic of U.S. style international schools in Latin America. Similarly, the fact that the bilingual programme within these schools is born out of choice rather than necessity suggests that schools that have become bilingual as a marketing strategy may be considered less legitimate than those that that have maintained the goal of developing "mutual comprehension" (Fitzgerald 1955:337) from a cultural perspective.

The data from participants suggests that persisting cognitive frameworks related to the characteristics of the student population in traditional 'international schools' may be difficult to shift, resulting in a continued judgement of international schools in Latin America as being less legitimately 'international' than those with a higher expatriate student population. However, to identify the schools within the study as being "non-premium" (Bunnell 2019) as a result of their student population would be to equate them with the "largely undiscovered and vague" (Bunnell 2019:51) schools that reside in the shadowy regions of the international education sector. This would seem to be inaccurate considering none of the schools is less than 20 years old and suggests that using student demographics as a marker of a school's legitimate claim to be 'international' would seem to be somewhat simplistic.

Data from the interviews suggests that participants equate the notion of 'internationalism' with both a pragmatic purpose and a focus on international-mindedness and, as such, the participant perspectives seem to be in line with the concept of the 'modern' international school described by Hayden and Thompson (2010).

In terms of relational systems, the emphasis on leadership structures that are distributive together with working conditions and relationships that are considered fair and just, while not factors identified by Bunnell as being characteristic of a ‘premium’ school would seem to be factors that might set a ‘legitimate’ school apart from one whose legitimacy might be debated. It is of note that schools in which leadership does not appear to be ‘fair’ or ‘just’ run the risk of being pilloried by disgruntled teachers on websites such as ISR.com where a negative evaluation can represent a significant threat to legitimacy for even very well established schools (Deephouse et al 2017).

With reference to artefacts, the possibility of students receiving a dual national and U.S. high school diploma seems to be a key characteristic of a legitimate U.S. style international school in Latin America.

4.3.5. Summary

Table 6 (adapted from Bunnell et al 207b) summarises the findings and identifies the institutional primary task and the pillars and examples of carriers that institutionalise a school as a legitimate U.S. style international school in Latin America. The identification of these characteristics therefore extends and enriches the definition of a U.S. style international school in this particular context.

	Institutional Primary Task To provide a bi-national, bilingual curriculum that promotes international-mindedness and provides access to further education in both national and international contexts.		
	Regulative	**Normative**	**Cultural-Cognitive**
Symbolic Systems	Accreditation by U.S. regional or international accreditation organisations in addition to that of the local Ministry of education Authorized to offer IB programmes and/or College board programmes (Advanced Placement/SAT) or equivalent.	Curriculum based on an internationally recognised set of standards and expectations blended with local requirements. Institutional values that reflect international-mindedness, diversity and global citizenship	Student choice as a central tenet, or fundamental principle of the school programme. Elective bilingualism provides students with the opportunity to gain social capital and facilitate access to international universities A student population made up of both local and international students.
Relational Systems	Governance systems that contain clear boundaries and consolidate the right to function without interference.	Student performance data used to drive progress within established systems of mutual accountability Mutual accountability represented in the fulfilment of expected roles within established collaborative procedures	Distributed leadership structures. A positive school culture Employment conditions support staff well-being, sense of value and are perceived as ´fair'. Membership of U.S. based professional organisation (AASSA/Tri-Association)
Actions	Systems for monitoring and sanctioning that consider context. Accreditation visits / inspections by external organisations	A coordinated and coherent pedagogic approach characterised by ´progressive' instructional strategies such as inquiry- based learning and project-based learning.	Professional development and structures of support that consolidate shared sense making and capacity to deliver the institutional primary task.
Artefacts	School accreditation and authorization certificates .	Teacher profiles that reflect the school's capacity to provide a bilingual, bicultural programme and that represent international mindedness.	Student outcomes that culminate in a dual U.S. High School and host country 'Bachiller' diploma.

Table 6. The institutional primary task and the pillars and examples of carriers that institutionalise a school as a legitimate U.S style international school in Latin America.

Adapted from Bunnell et al (2017b)

CHAPTER 5: CONCLUSIONS AND POSSIBILITIES FOR FURTHER STUDY

Chapter 5 presents the conclusions that can be drawn from the study. Section 5.1 describes conclusions related to Research Questions 1 and 2, and makes an original contribution to research by identifying those characteristics that might be regarded as common to U.S. style international schools in Latin America. In doing so, the study contributes to an area of study that has so far been neglected within the research. Section 5.2 outlines conclusions in terms of Research Question 3 and also presents an original contribution to research by suggesting that Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools is limited in the sense that it focuses on the rational 'building blocks' of institutionalisation (Scott 2003, 2014) but neglects to consider the ways in which judgements of legitimacy might have an 'emotional' bias. The study suggests that Bunnell et al's (2017b) analytical framework should be extended to take into account the cognitive schemata and heuristics of the observer that act as a filter on perceptions of legitimacy, leading to 'emotional' responses. Section 5.3 outlines some of the practical applications that could be implemented as a result of the study while 5.4 discusses particular implications for school leaders. Sections 5.5 and 5.6 describe some of the limitations of the current study and possibilities for further study while Section 5.7 concludes with some closing observations.

5.1. Research Questions 1 and 2

In terms of Research Questions 1 and 2, although it cannot be claimed that the factors identified in this particular study are definitive and generalisable to other contexts, the study does make an original contribution to research by suggesting that there are factors common to U.S. style international schools in Latin America (see Table 6) that can be identified as "desirable, proper and appropriate" (Suchman 1995:194) within this context. For example, the identification of 'choice' as a key concept in terms of the curriculum suggests that an increased emphasis on student-based choice may be a differentiating factor between U.S style international schools in Latin America and other types of schools within the international sector. The study also suggests a 'blended' curriculum that incorporates elements from U.S. based curriculum and standards with local, national curricula might be typical of this group of schools. Indeed, rather than being an indicator of a school's non-premium status, this blended curriculum could represent an advantage for students by widening possibilities for entrance to further education. The study also suggests that the presence of a high percentage of local students is not a 'new'

phenomenon, but one that has been typical of U.S. style international schools in the region since their inception. As a result, while comparisons with the diverse nationalities of international school students in other regions of the world might cause observers to question the 'international' status of schools on a global level, at a local level, this comparison is deemed to be of little value and one that is, indeed, "inadequate" (Bunnell 2014:40).

Evidence from the study also disputes the characterisation of U.S. style international schools as being purely competency based or pragmatic in nature (Bunnell 2019), suggesting that, in line with the findings of Bittencourt and Willetts (2018), the concept of international mindedness is at the forefront of institutional identity and a central aspect of their institutional primary task. Indeed, there was little to suggest that tensions between the pragmatic and ideal aims of the school were of significant concern to participants within the study. However, the results of the study do suggest that there may be a lack of coherence between some of the characteristics of U.S. style international schools in Latin America and the ideals of international mindedness. Hill (2014) indicates that international school leaders should address the "complex, multidimensional processes of globalisation and issues related to diversity, inequality and interconnectedness" (p.182). However, the 'elite' positioning of U.S. style international school within the "bifurcated" (Stromquist 2006:975) education system of Latin America could be seen as consolidating rather than disrupting existing social inequalities. In particular, participants identify the provision of a bilingual programme as central to the institutional primary task of their schools and see the acquisition of bilingualism and biculturalism as "desirable, proper and appropriate" (Suchman 1995:574) within their context. They do not comment on the fact that the cultural-linguistic context of their schools may provide additional socio-economic advantages to an already privileged group that may subsequently increase inequality within the local context, creating cultural tensions that may reduce interconnectedness (Emenike and Plowright 2017).

Table 6 also emphasises the fact that the institutional legitimacy of a school is not based solely on factors such as curriculum and instruction but also upon the effective management of the school as a business. This would seem to be in line with what Starr (2021) refers to as an increasing awareness of the need for "competent, efficient school business leadership and management" (p.108) within a context that demands increased accountability. The current study indicates that the management of human resources is of particular importance within this area. For example, the results suggest that having qualified teachers representing the bilingual, bicultural nature of the school is a key element of the legitimacy of a U.S. style international school in Latin America and something that should be 'protected' even when the school comes

under pressure of budget restraints. However, once again, this same emphasis may also represent a risk to the concept of international mindedness. The continued emphasis on the hiring of expatriate teachers and, in particular, of "one significant national/ethnic grouping (of native English-speaking Anglo-American heritage" (Bunnell and Atkinson 2020:263) could be seen as incoherent with concepts of equality, particularly when those teachers are compensated at a higher level than their 'local' counterparts. Indeed, a differentiated system of remuneration could lead to the perception that expatriate teachers "possess higher economic, cultural, symbolic and social capital than others" (ibid) and would seem to consolidate, rather than question, a system that positions the Anglo-American culture and identity as privileged and dominant within the international school arena. Challenging this perception will be increasingly important if schools are to genuinely deal with issues of "diversity, inequality and interconnectedness" (Hill 2014:182).

In summary, the study contributes to the literature by suggesting that the binary classification of schools into "premium" and "non-premium" status (Bunnell 2019) is questionable in the context of Latin America. In particular, it suggests that the concepts of a ´blended´ curriculum and a local student population are common characteristics that do not detract from the "premium" status of a school. The study also suggests that to consolidate institutional legitimacy, closer attention should be paid to the business aspects of school organisation and, in particular, that the management of human resources may be critical. Finally, the study suggests that tensions between the ideals of international mindedness and the positioning of schools within a system that could be considered discriminatory (Bunnell and Atkinson 2020) are likely to become of increasing importance to the legitimacy of U.S. style international schools in Latin America.

5.2 Research Question 3

With reference to Research Question 3, the study confirms that Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools is an effective heuristic device that can be used to further an understanding of institutional legitimacy. Indeed, the information provided in Table 6 provides a general framework that could help identify the symbols, actions, relational systems and artefacts that might be employed in U.S. style international schools in Latin America and could therefore provide practical guidance for school heads who are tasked with managing institutional legitimacy.

The results of the study also suggest that while establishing legitimacy through the pillars of institutionalisation and their alignment with the institutional primary task may support 'rational' judgements of institutional legitimacy, those judgements are also filtered through personal biases in a way that can lead to "emotional reactions" (Huy et al 2014:1655). The study makes an original contribution to research by arguing that Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools should be extended to incorporate an additional filter on perceptions of legitimacy that includes the cognitive schemata and heuristics of the observer. The following paragraphs outline this argument.

Nisbett and Ross (1980) suggest that perceptions of legitimacy are "assimilated into pre-existing structures in the mind of the perceiver" (p 36) while Lenz and Viola (2017) argue that judgements of legitimacy are rooted in the "cognitive schemata and heuristics" (p 947) of individuals. As a result, if an individual's observations are aligned with their personal expectations as defined within existing cognitive schemata and heuristics, their subsequent 'emotional' reactions are likely to be positive, creating a feedback loop that strengthens congruence and affirms legitimacy. However, if there is a lack of alignment, the 'emotional' reactions could be negative, creating a sense of discomfort and anxiety that prompts the critical revision of legitimacy judgments (Lenz and Viola 2017). A number of examples of this phenomenon were identified within the results of the study including, for example, the references to rules and regulations related to student behaviour. While these rules and regulations may be 'concrete' manifestations of the regulative pillar and understood from a rational point of view, judgements of their legitimacy were referred to as being subject to an individual´s pre-existing beliefs and assumptions. This demonstrates that the implementation of rules and regulations that are not in line with an individual's beliefs and assumptions would seem to cause 'emotional' reactions regardless of whether they are established in policy documents and procedures. Similarly, a curricular programme such as the IB Diploma Programme may have all the hallmarks of legitimacy, consolidating a school's institutional primary task and all three pillars of institutionalisation, but if it does not offer the kind of 'choice,' or the values that an observer equates with a specifically U.S. style education, it may not 'fit' with an individual's perception of what is "desirable, proper or appropriate" (Suchman 1995:574) in a U.S. style international school (Mahfouz et al 2019). Again, this can cause an individual to reject the programme from an 'emotional' perspective even while recognizing its legitimacy.

Further examples of ‘emotional’ reactions can be seen in participant observations of issues such as accreditation, the profit or non-profit status of a school, and the nature of the student population. While accreditation is generally accepted as an indicator of a legitimate organisation, judgements of the legitimacy of the accreditation process itself would seem to be influenced by an individual´s experience of the process and their knowledge of schools that have been assigned accredited status. This knowledge and experience can subsequently influence perceptions of legitimacy in other schools. In terms of the profit or non-profit nature of a school, values-based perceptions of education as having an ‘altruistic’ purpose mean that for certain individuals, a for-profit school may be considered less legitimate than a non-profit school, regardless of how well the pillars of institutionalisation in that school are established and how far they are aligned with its stated primary task. Finally, persistent cognitive frameworks regarding the nature of an international student population means that despite ‘rationalising’ the fact that a school may be international with only a small percentage of expatriate students, there is still a tendency to ‘judge’ a school as less international if it is formed of a local student majority. These examples support the notion that judgements of legitimacy are subject to bias, based on comparisons, and have an element of ‘stickiness’ in that they tend to remain in place even when an observer is aware they should change (Lenz and Viola 2017). The examples support the notion that judgements of legitimacy are not purely rational, based only on perceptions of congruency with regulative, normative and cultural-cognitive expectations, but are also influenced by the assumptions, beliefs and related emotions of the observer.

It should be noted that the concept of a connection between institutionalisation, legitimacy and emotion is not a new one. In terms of institutionalisation, Bunnell et al (2017a) indicate that “institutionalisation processes are powerful and significantly affect teacher behaviour and identity” (p.5), acknowledging that ‘emotions’ form a significant part of that identity. In particular, they indicate that the carriers of the cultural-cognitive pillar may promote and engender an institutional “thought-style” (p.5) that can be somewhat coercive, causing individuals to think and behave in a way that may or may not be aligned with their own personal beliefs. However, they do not go on to explore how any lack of agreement between the institutional and the individual ‘thought style’ might influence an individual’s emotions or their perceptions of institutional legitimacy. The results from the current study suggest that while the carriers of the cultural-cognitive pillar may, indeed, facilitate the assimilation of an individual into an institution, those individuals are not empty vessels (Lenz and Viola 2017; Nisbett and Ross 1980) but contain and are characterised by schemata “based on prior experience and mental models” (Lenz and Viola

2017:949). These pre-existing cognitive schemata and heuristics influence not only the way in which 'sense' might be made of the cultural-cognitive practices and "frames of reference" of an organisation (Bunnell et al 2017a:5), but also how carriers of the cultural-cognitive, regulative and normative pillar are perceived and responded to at an emotional level. This filtering of information is of particular significance within the context of a bicultural or multicultural institution where underlying expectations of the regulative, normative and cultural-cognitive pillars may not be shared throughout the organisation and where actors may have to suppress their individual beliefs and assumptions in order to 'fit in'. Indeed, the study suggests that an individual's level of 'agreement' with an institutional thought-style and related behaviours is highly relevant to perceptions of legitimacy and is a factor that should not be dismissed. Individuals who find themselves influenced by a thought-style that contrasts with their personal beliefs, or who participate in institutional behaviours with which they do not feel comfortable, are likely to experience a series of "negative emotions" (Lenz and Viola 2017:953) that lead to a reassessment of their perceptions of legitimacy.

The current study therefore contributes to research in the area by recognising that "the omission of emotions from dominant cognitive perspectives limits our understanding of how persons participate in institutional processes" (Creed et al 2014:276). It suggests that the 'rational' aspects of institutionalisation as represented by Scott's pillars of institutionalisation and the institutional primary task are limited in explaining influences on judgements of legitimacy and contributes to research in the area by proposing that the analytical framework for theorising the institutionalisation of international schools (Bunnell et al 2017b) be extended to incorporate a model of institutional legitimacy that includes the cognitive schemata and heuristics of the observer (Lenz and Viola 2017). Figure 2. Illustrates this concept by combining Bunnell et al's (2017b) analytical framework with the cognitive model of organisational legitimacy developed by Lenz and Viola (2017). It indicates how the cognitive schemata and heuristics of the observer filter the individual's perceptions of the "building blocks" of institutionalisation suggesting that judgements of legitimacy are not simply objective, rational measurements of congruency against "underlying norms and organisational features" (Lenz and Viola 2017:947), but complex evaluations that are open to bias and subject to emotion.

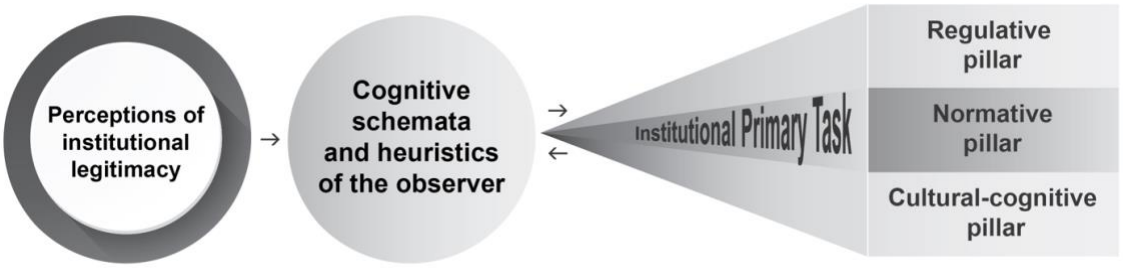

Figure 2. Extended analytical framework for theorising the institutionalisation of international schools. Adapted from Bunnell et al (2017b) and Lenz and Viola (2017)

5.3 Practical Applications

Patterson and Williams (2002) argue that in order for a study to be valid, the results should prove to have practical utility. This section will outline some of the ways in which the findings related to the research questions might be of practical use to school heads in U.S. style international schools In Latin America and could be extended to schools in other contexts.

Bunnell et al (2017b) indicate that the analytical framework for theorising the institutionalisation of international schools could be "developed into an instrument for auditing schools and their international nature" (p.313). By identifying characteristics that influence the perceptions of institutional legitimacy of school heads in U.S. style international schools in Latin America, Table 6 outlines a tool that could be used to audit schools within that context. The tool could be used by school heads to measure how far their school might fit with the expectations of U.S. style international schools in Latin America and identify those areas that might be absent or lacking in alignment and subsequently pose a threat to legitimacy. The identification of a possible 'institutional primary task' may be of particular use in that while many schools have a clearly defined mission and vision statement, these tend to be goal oriented and do not necessarily establish the task that the school "must perform if it is to survive" (Miller and Rice 1967:25). Using the institutional primary task as identified in Table 6 as starting point for discussion, would enable school heads in U.S. style international schools in Latin America not only to establish clarity in terms of a "focus for purposeful action" (Bunnell et al 2017b:306), but also to measure how far the symbols, actions, relations and activities of their school are congruent with that task. Establishing clarity in terms of the institutional primary task may also be a way of reconciling the

pragmatic and idealistic aims of a school, promoting the “coexistence” (Bittencourt and Willetts 2018:523) of the two and ensuring that neither is marginalised to the benefit of the other.

The fact that effective financial management and ‘fair’ employment conditions were highlighted as factors contributing towards perceptions of legitimacy also has practical implications for school heads, not only within the context of the current study but also in broader terms and at both a national and international level. The importance of the business aspect of school leadership is highlighted by Starr (2021) who indicates that there is “significant disquiet” about the lack of knowledge of business management among school heads and, indeed, governors. This may pose a threat to legitimacy particularly if, as Starr (2021) notes, school heads have the “power to instigate profligate or unwise spending” (113), or if they fail to plan strategically for long term financial needs. The threat to legitimacy may be exacerbated if board members also “fail to appreciate the extent or seriousness of their responsibilities or the difference between governance and management” (ibid). In order to avoid these risks, an increasing number of schools are depending on school business managers to direct and manage the “myriad responsibilities” (ibid: 108) that running the school as a business entails. While this may help to consolidate legitimacy, it can, in itself, represent a threat if decisions on issues such as staff remuneration and the establishment of contractual decisions are delegated to individuals who may not see the school through an educational lens (Macdonald 2008). Indeed, while it may be tempting to delegate financial matters to someone with the appropriate technical expertise, and while it may seem “counter-intuitive” (p.52) for school heads to focus on finance, it is essential for school heads to understand and participate in the management of finance if they are to consolidate the legitimacy of their school as an educational institution. This has particular implications for the training and preparation for school heads who frequently assume the role with little experience or formal professional development in business and finance.

Keller (2015) observes that “It is the challenge of leaders to make sense of opposing perspectives within their school, and to help their school community do the same” (p. 913), suggesting a two-stage framework for managing the complexities of international schools that first aims to make sense of the “cultural dualities” (p. 905) present in the community, before “‘reframing’ leadership challenges into structural, human resource, political and symbolic frames” (p.908). The current study suggests that a similar two-stage process is involved in the establishment of institutional legitimacy in international schools and that school leaders must seek to both make sense of the “cultural dualities” (Keller 2015:905) inherent in the organisation

and “reframe” or synthesize those dualities into a focus on the institutional primary task and the pillars of institutionalisation. Figure 3 illustrates how, from this perspective, the school head must act as an ‘inverted prism’, channelling the diverse cognitive schemata and heuristics of stakeholders into a singular focus on the building blocks of institutional legitimacy. Figure 3 also suggests that the process is bidirectional and that school heads must act as a traditional prism, communicating the singular primary task in a way that makes sense to multiple stakeholders.

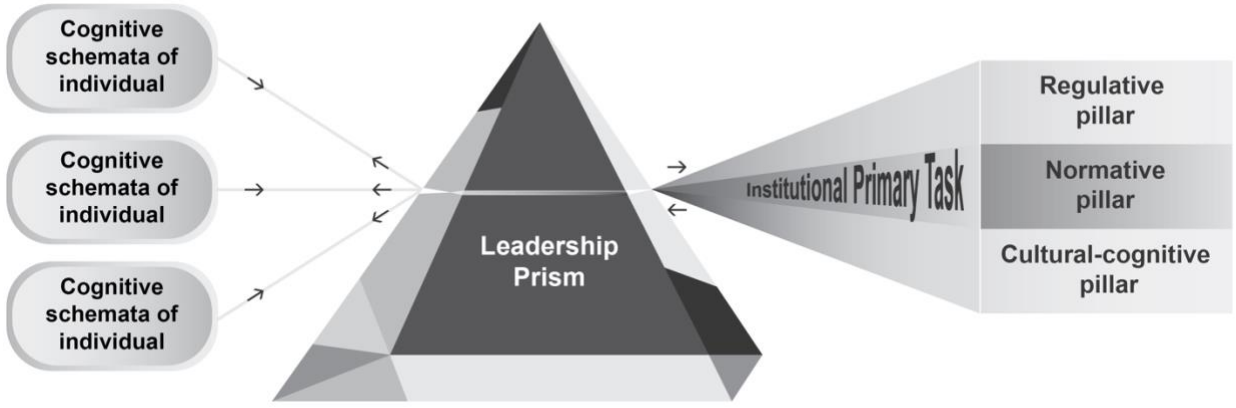

Figure 3. Leadership prism: The influence of school leaders on stakeholder perceptions of institutional legitimacy

While the concept of school leaders having the “ability to comprehend dualities and bring differing perspectives into a unified understanding” (Keller 2015:913) is not a new one, suggesting that this “unified understanding” could be achieved by processing multiple perspectives and focusing them on the institutional primary task and pillars of institutionalisation would seem to make an original contribution to the field. There are also practical implications for school leaders in that in order to arrive at this “unified understanding”, they must seek to understand and assimilate different, even conflicting points of view while at the same time, maintaining an institutional focus. In effect, they must become consummate diplomats and negotiators, a skill which is again somewhat absent on the training courses for school heads. Examples of the need for diplomacy and negotiation can be seen when considering, for example, the diverse range of student evaluation systems that are implemented in schools within the international context. In U.S. style international schools, where students may ‘pass’ or ‘fail ‘an academic year based on teacher grades, the legitimacy of the evaluation system is of critical importance. From a rational perspective, student evaluation systems are built upon the

standards and expectations of the normative pillar while the 'mechanics' of evaluation are established through rules and regulations regarding how grades will be calculated, stored and reported. The cultural-cognitive pillar is also important in terms of identifying which evaluation criteria might be included and how each criteria might be weighted. Nonetheless, while the normative, regulative and cultural-cognitive elements of an evaluation system may be rationalised and communicated to teachers, schematic frameworks built on previous experience can create an emotional bias towards student evaluation that may impact a teacher's professional identity and influence perceptions of legitimacy. For example, teachers may feel uncomfortable when a system either includes or excludes 'behaviour' and 'attitude' grades and may see this as having an impact on their relationship with students. They may question the validity of grade calculation if, for example, it is based on averages and does not reflect the 'true' perception they have of student achievement. Similarly, if a teacher does not come from a U.S, style system, they may feel the concepts of a student 'passing' or 'failing' an academic year and having to 'repeat' that school year are questionable. As a result, rather than simply focusing on the mechanics of a system, or looking to establish and communicate standards and criteria, it is important for school leaders to bring assumptions and beliefs about student evaluation to the fore. Individuals who understand why certain strategies have been implemented and recognise the reasoning behind those decisions are more likely to respond positively and consider them legitimate even if there are aspects with which they do not fully agree. By recognising the cognitive frameworks of individuals and responding to the emotional impact those cognitive frameworks may have on perceptions of legitimacy, school leaders are more likely to facilitate an individual's assimilation into the institution and consolidate their perceptions of legitimacy.

5.4 Limitations of the study.

The scope of this study was limited in the sense that data was drawn from interviews with fourteen general directors at U.S. style international schools in Latin America. As a result, the factors that were identified during the study cannot be generalised to those that might influence the perceptions of institutional legitimacy among school leaders in other U.S. style international schools in Latin America nor to other international schools within the same or other regions.

The study was purely qualitative in nature and it should be noted that the factors identified were filtered through my own perceptions as a researcher. As a result, certain factors may have been highlighted over others as a result of my own biases as a school leader in a U.S. style international school. Other researchers may consider different factors as having more weight within the analysis and a mixed-methods, or quantitative study may have highlighted alternative perspectives.

The data is also limited in that it represents a snapshot in time. Even with the same participants, interviews at a different date may produce different responses, particularly as changes occur in the external environment and context of the school. An example of this is the Covid-19 global health crisis, which caused schools to radically change their methods of instruction, and to focus on the health and safety of the community as a top priority. Under these circumstances, the factors that influence perceptions of the institutional legitimacy of a school are likely to be very different.

5.5 Possibilities for further study

The current study makes a unique contribution to the study of legitimacy in international schools by drawing upon data from U.S. style international schools in Latin America, which, despite being a relatively small group of schools, provides a rich, untapped source of information that can be used to reflect upon international schools in other contexts. In doing so, the study also brings up a number of possibilities for further study. In particular, a similar study could be undertaken using data from other stakeholder groups such as teachers, students, parents and/or members of international school boards. Indeed, comparative studies could be carried out using more than one stakeholder group within any one particular school. Comparative studies could also be carried out using the extended analytical framework for theorising the institutionalisation of international schools to make a more direct comparison between perceptions of institutional legitimacy in U.S. style international schools in different regions of the world, or to compare, for example, U.S. style and British-ethos schools within specific regions. In particular, the framework could be used to provide clarity in terms of characteristics that might be considered representative of a legitimate school within any specific classification. For example, Poole (2020) argues for the identification of what he terms “Chinese internationalised schools” (CIS) as examples of a “prototypical globalised school for the future”. These schools share many characteristics with the U.S. style international schools explored in

this study in that they employ a bilingual-medium of instruction; have a relatively homogenous body of local students and a deliver a blended curriculum that incorporates both national and international elements. However, Poole (2020) also indicates that many of the teachers in CIS are not qualified teachers but instead rely on “a wealth of academic and cross-cultural experiences” (p 452). This lack of formal teacher qualifications would bring the institutional legitimacy of CIS into question if they were placed in the context of the current study and measured against the characteristics identified in Table 6. The comparison of CIS with U.S. style international schools in Latin America illustrates how employing the analytical framework for the institutionalisation of international schools can allow for a typification of ‘groups’ of schools that could facilitate further understanding of the international school sector at a broader level.

The identification within the study of factors related to the financial and business aspects of school organisation indicate that this could be an interesting area for further research. Indeed, as Starr (2021) notes, there is a need for more debate and research that places the business component of school leadership at the centre. The current study would suggest that research that focuses on the triumvirate relationship of school board, school head and school business manager could form the focus of further research, particularly in terms of how that relationship might strengthen or subvert the conditions for institutional legitimacy. Other aspects of schools as ‘business’ organisations could also be explored through quantitative studies. For example, surveys could be carried out in relation to perceptions of profit and non-profit schools in order to identify where the ´tipping point’ may exist at which the profit making status of a school may outweigh other factors and cause an observer to question its legitimacy.

The results of the study also reflected a growing concern with the Anglo-Western bias of international schools and suggest that it might be important to identify key factors schools should consider in order to maintain legitimacy as an international school in an environment that increasingly questions the dominance of the Anglo-Western culture. Focusing on how such biases are present in the cognitive schemata and heuristics of community members and of school leaders in particular may be of particular interest. Indeed, Bunnell and Atkinson (2020) suggest that an “exciting, new sociological research agenda” (p. 264) is beginning to emerge related to the fact that the international school sector continues to be dominated by Anglo-American educators with systems and structures that might be considered discriminatory. While research so far has focused mainly on the conditions of local versus expatriate teachers, the

current study would suggest that there is also scope for research into school heads and other school leaders who are tasked with recruiting those teachers and defining the conditions by which they will be compensated. In particular, while it may be a small group, research into the perceptions of international school heads who are host country nationals would provide an interesting and potentially enlightening avenue of research.

The study contributes to research in the field by focusing on the perspective of school heads and exploring how Bunnell et al's (2017b) analytical framework for theorising the institutionalisation of international schools could be used by these individuals to guide and facilitate the establishment of legitimacy in international schools. The study suggests that it is important for school heads to be cognizant of the factors that influence perceptions of legitimacy, not only from a rational perspective, but also in terms of how the actions and initiatives employed by the school might impact upon an individual's judgement of institutional legitimacy from an emotional point of view. In terms of further research, it would be interesting to identify the particular capacities that might be needed for school heads to develop the 'cognitive complexity' (Woznyj et al 2020) necessary to accommodate varying schemata and heuristics in relation to legitimacy. For example, it could be that school heads learn to "suspend judgement" (Laverty 2003:23), setting to one side their own individual biases in order to incorporate an understanding of others, or they may 'suspend disbelief' of certain social and cultural norms, accepting that while they may not fit with their own personal expectations, they are necessary within a given context. Da'as et al (2018) explore the cognitive complexity of school leaders using a framework that distinguishes between an individual´s capacity for differentiation (the ability to apply different perspectives to a situation), and integration (the ability to organise and synthesize information in complex situations). Using this, or another similar framework may help to identify the skills school heads might need to successfully manage the diverse cognitive schemata and heuristics of their constituents and at the same time, channel energies towards a focus on the institutional primary task.

5.6 Concluding Observations

The current study aimed to explore the factors that influence perceptions of institutional legitimacy among school leaders and, specifically, school heads in U.S. style international schools in Latin America. The study is of significance in that it extends research on institutional

legitimacy into a region and group of schools that are currently under-researched, and is of particular importance in that it contributes towards a typification of U.S. style international schools in Latin America. Exploring the characteristics of these schools through the use of Bunnell et al's (2017b) analytical framework for the institutionalisation of international schools allows for a comparison of schools in other international contexts that is both illustrative and informative.

The results of the study also suggest that the criteria by which a school might be measured as 'legitimate' within the international context is not necessarily static. As the international context and nature of globalisation evolves, then so too, must related perceptions of legitimacy. For example, the results confirm that the judgement of a school as more or less international on the basis of its student population is, indeed, "inadequate" (Bunnell 2014:40) and tied to a perception of globalisation that is, at best 'nostalgic' and, at worst, colonialist. Indeed, the results suggest that changing perspectives of globalisation and increased considerations of diversity, equity, inclusion and social justice mean that schools may need to evaluate how far certain strategies (such as the hiring and differentiated remuneration of expatriate staff) might eventually undermine legitimate claims to the ideals of internationalisation.

The study focuses on school leaders, and school heads in particular, as it is they who are ultimately responsible for the establishment of institutional legitimacy. The results of the study provide guidance for school heads by identifying the specific carriers of institutionalisation that might be used to establish legitimacy within the particular context of U.S. style international schools in Latin America. Identifying these carriers is important as their implementation will allow school heads to ensure their school is distinguished from those that may belong to the shadowy "underbelly" of schools (Bunnell 2019:6) that assume the title of 'international' for purely instrumental purposes. The study also suggests that in order to establish institutional legitimacy effectively, school heads must develop a level of cognitive complexity that allows them not only to recognise, but also relate to the diverse perceptions of stakeholders. It suggests that school heads must synthesise these diverse points of view and channel them into a shared focus on the pillars of institutionalisation and the institutional primary task in order to consolidate institutional legitimacy and ensure that is can be sustained. Sustaining this legitimacy is also of benefit to the school head's own professional status as working in a legitimate institution provides a context in which school leaders benefit from high levels of trust and are able to function without interference.

It is clear that the issue of institutional legitimacy in international schools is one that is likely to remain relevant as the international school sector grows and as schools find themselves adjusting to an ever-evolving and increasingly uncertain global context. The capacity of school leaders in general and of school heads in particular to promote the conditions by which institutional legitimacy can be established will be of vital importance in creating a sense of stability and consolidating a sense of trust in an organisation that will allow for the 'primary task' of promoting student learning to be successful.

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APPENDIX 1: PARTICIPANT INFORMATION SHEET

Researcher: Ruth Allen **Supervisor:** Chris James

This information sheet forms part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. Please read this information sheet carefully and ask the researcher named above if you are not clear about any details of the project

You are being asked to participate in this project because of your role as **Head of School at an AASSA or Tri Association member school.**

It is completely up to you to decide if you would like to participate. Before you decide to take part, please review the information on this sheet. If you agree to take part, you will be asked to sign a consent form. **However, if at any time you decide you no longer wish to take part in the project you are free to withdraw without giving a reason.**

Your participation will take the form of an interview with the researcher that will last for approximately 45 minutes.

There are no obvious direct benefits of taking part in this project. However, the information that you and other participants provide in this project may help to identify factors, which could positively influence the establishment of institutional legitimacy in international schools in South America.

There are no obvious disadvantages to you taking part in the project and if you take part in the project, you should not be made to feel any discomfort or embarrassment. If, in the interview, you are asked a question that you do not want to answer, you can decline to answer without giving a reason.

Only the researcher will have access to information that you provide. All records, including personal, identifiable data will be treated as confidential. Recorded data will not be kept for any longer than 5 years. Your name or other identifying information will not be disclosed in any presentation or publication of the research.

You can withdraw from the interview at any point without providing reasons for doing so. If, for any reason, you wish to withdraw your data please contact the researcher as soon as possible and before June 2020, which is the date the research project is to be submitted.

If you have a concern about any aspect of the project, you should speak to the researcher who will do their best to answer any questions.

APPENDIX 2: RESEARCH PARTICIPANT CONSENT FORM

RESEARCH PROJECT: Institutional Legitimacy in International Schools.

Researcher: Ruth Allen rallen@columbus.edu.co
Supervisor: Chris James cj234@bath.ac.uk

Please indicate your agreement by putting your initials after each statement.

1. I have been provided with information explaining what participation in this project involves.

2. I have had an opportunity to ask questions and discuss this project.

3. I have received satisfactory answers to all questions I have asked.

4. I have received enough information about the project to make a decision about my participation.

5. I understand that I am free to withdraw my consent to participate in the project at any time without having to give a reason for withdrawing.

6. I understand that I am free to withdraw my data before June 2020.

7. I understand the nature and purpose of the procedures involved in this project. These have been communicated to me on the information sheet accompanying this form.

8. I understand and acknowledge that the investigation is designed to promote knowledge about international education and that the researcher will use the data I provide only for the purpose(s) set out in the information sheet.

9. I understand the data I provide will be treated as confidential, and that upon completion of the project my name or other identifying information will not be disclosed in any presentation or publication of the research.

10. I understand that my consent to use the data I provide is conditional upon the researcher's compliance with appropriate duties and obligations regarding Data Protection.

12. I hereby fully and freely consent to my participation in this project

Participant's signature: _____ Date: _____

Participant name in BLOCK Letters: _____

Researcher's signature: _____ Date: _____

Researcher name in BLOCK Letters: _____

APPENDIX 3: PROJECT INFORMATION SHEET

Working Title: Institutional legitimacy in international schools. A multi-perspective exploration of institutional legitimacy in international schools in Latin America.

CONTEXT Suchman (1995) defines legitimacy as: "*a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions*" (Suchman 1995:574). An organization that is judged legitimate by its stakeholders is likely to prosper but one which is judged "*illegitimate*" may very well fail to engage stakeholders and ultimately "*cease to exist*" (Deephouse et al 2017:33).

While important for all schools, Bunnell et al (2016) indicate that establishing institutional legitimacy is "*crucial*" for the "*success and survival of international schools*" as well as being "*critically important*" for the students and teachers within them (Bunnell et al 2016:409).

RESEARCH OBJECTIVES:

- To explore perspectives of institutional legitimacy in international schools in Latin America.
- To identify the factors that influence perceptions of institutional legitimacy in international schools in Latin America.
- To inform the strategic management of institutional legitimacy in international schools in Latin America.

OBJECTIVE OF THE INTERVIEW:

- To explore school leaders' views of institutional legitimacy at international schools in Latin America.

GUIDING QUESTIONS FOR INTERVIEW:

1. What aspects of a school do you take into consideration when judging how legitimate it is as an educational institution?
2. What aspects of a school do you take into consideration when judging how legitimate it is as an "international" school?
3. What factors do you consider may influence perceptions of institutional legitimacy in schools, such as your own, within the broader international context?

APPENDIX 4: LEVEL 1 AND LEVEL 2 CODING: Topics and Themes

	LEVEL 1 CODING: TOPICS	LEVEL 2 CODING: THEMES
1	Student performance data	ACCOUNTABILITY
2	Leadership accountability	ACCOUNTABILITY
3	Teacher accountability	ACCOUNTABILITY
4	Standardised tests	ACCOUNTABILITY
5	Accreditation	ACCREDITATION
6	Legal requirements	ACCREDITATION
7	Mission and vision	ALIGNMENT WITH PURPOSE
8	Systems and processes	ALIGNMENT WITH PURPOSE
9	Festivals and flags	BICULTURAL/MULTICULTURAL CONTEXT
10	Language	BILINGUALISM
11	Bilingualism	BILINGUALISM
12	Social capital	BILINGUALISM
13	Standards and benchmarks	CURRICULUM
14	Curriculum	CURRICULUM
15	Intentionality	CURRICULUM
16	Curriculum model	CURRICULUM
17	Learning outcomes	CURRICULUM
18	National government	GOVERNANCE
19	International Baccalaureate programmes	INTERNATIONAL CURRICULUM
20	AP Programmes	INTERNATIONAL CURRICULUM
21	Eclectic Curriculum	INTERNATIONAL CURRICULUM
22	Choice	INTERNATIONAL CURRICULUM
23	Dual Diploma	INTERNATIONAL CURRICULUM
24	American curriculum	INTERNATIONAL CURRICULUM
25	International mindedness	INTERNATIONAL MINDEDNESS
26	Foreign Enclave	INTERNATIONAL MINDEDNESS
27	Internationalism	INTERNATIONAL MINDEDNESS
28	Global citizenship	INTERNATIONAL MINDEDNESS

29	Diversity	INTERNATIONAL MINDEDNESS
30	Change management	LEADERSHIP
31	Leadership skills	LEADERSHIP
32	Autonomy	LEADERSHIP
33	School leader's nationality	LEADERSHIP
34	School leader's rotation	LEADERSHIP
35	Leadership team	LEADERSHIP
36	Student behaviour management	LEADERSHIP
37	Professional networks	NETWORKING
38	Alignment board and head	ORGANISATIONAL STRUCTURE
39	Relationship board and head	ORGANISATIONAL STRUCTURE
40	Board structure	ORGANISATIONAL STRUCTURE
41	Classroom layout	PEDAGOGICAL PRACTICE
42	Classroom resources	PEDAGOGICAL PRACTICE
43	Technology	PEDAGOGICAL PRACTICE
44	Teacher autonomy	PEDAGOGICAL PRACTICES
45	Instruction	PEDAGOGICAL PRACTICES
46	Concept of teaching	PEDAGOGICAL PRACTICES
47	Critical thinking	PEDAGOGICAL PRACTICES
48	Innovation	PEDAGOGICAL PRACTICES
49	Altruism	PROFIT NON-PROFIT
50	Budget	PROFIT NON-PROFIT
51	Financial sustainability	PROFIT NON-PROFIT
52	Profit non-profit	PROFIT NON-PROFIT
53	Professional development budget	PROFIT NON-PROFIT
54	Staff equity	SCHOOL AS EMPLOYER
55	Salaries and benefits	SCHOOL AS EMPLOYER
56	Working conditions	SCHOOL AS EMPLOYER
57	Student - teacher ratio (workload)	SCHOOL AS EMPLOYER
58	Career impact	SCHOOL AS EMPLOYER
59	Staff well-being	SCHOOL AS EMPLOYER

60	School age	SCHOOL CULTURE
61	pop-up schools	SCHOOL CULTURE
62	School facilities and infrastructure	SCHOOL CULTURE
63	Safey	SCHOOL CULTURE
64	Size of school	SCHOOL CULTURE
65	Professional development	STAFF DEMOGRAPHICS
66	Teacher evaluation	STAFF DEMOGRAPHICS
67	Teacher recruitment	STAFF DEMOGRAPHICS
68	Teacher nationality	STAFF DEMOGRAPHICS
69	Teacher qualifications	STAFF DEMOGRAPHICS
70	Teacher experience	STAFF DEMOGRAPHICS
71	Teacher rotation	STAFF DEMOGRAPHICS
72	Best-fit for teachers	STAFF DEMOGRAPHICS
73	Teacher expectations	STAFF DEMOGRAPHICS
74	Comparisons with other schools	STUDENT DEMOGRAPHICS
75	Location	STUDENT DEMOGRAPHICS
76	Local students	STUDENT DEMOGRAPHICS
77	International students	STUDENT DEMOGRAPHICS
78	Graduate profile	STUDENT OUTCOMES
79	Parental expectations	STUDENT OUTCOMES
80	Student destinations	STUDENT OUTCOMES
81	Student results	STUDENT OUTCOMES
82	Student progress	STUDENT OUTCOMES
83	Student qualifications	STUDENT OUTCOMES
84	International mobility	STUDENT OUTCOMES
85	Deficit model (comparison to state schools)	STUDENT OUTCOMES

APPENDIX 5: THE CODING PROCESS

The following table provides some examples of the coding process using additional quotations from participants. As well as Level 1 (topics) and level 2 (themes) the process indicates how level 3 codes, based on the pillars of institutionalisation and institutional primary task and level 4 codes, related to the carriers of institutionalisation were used to analyse the data.

Quotation	Level 1 Code	Level 2 Code	Level 3 Code	Level 4 Code
	Topic	**Theme**	**Pillar(s) of Institutionalisation and Institutional Primary Task**	**Carrier(s) of institutionalisation**
The types of adopted programs that they're using you know the quality of them and you know even I´ve become even a bit biased - you know, the readers and writers workshop for example, when I see a school that's using the Readers and Writers workshop there's a sense of legitimacy that I give to that school if they´re using that model so I think that's kind of a bias that I might have	Curriculum model	CURRICULUM	Cultural -cognitive pillar (sense of familiarity with the programme)	Artefact and Activities
And then thinking more on the curriculum side, just that there's adopted standards and benchmarks I would want there to be unit plans I think that gives a sense of legitimacy to the institution.	Standards and benchmarks	CURRICULUM	Normative pillar (importance of alignment with established standards)	Artefacts
So in order to address issues of legitimacy among teachers and among community you've got to provide people with the facts and demonstrate the complexity of it all - it's like we can talk about diversity in terms of race or religion, social economic status, learning ability, sexual orientation, to say diversity - a lot of people think they go very quickly to what it means to them, for some based on their identity it's about sexual preference and orientation, for others it's a racial issue, for others it is a class issue and you have to let people know - its all of them, it's really broad and	Diversity	INTERNATIONAL-MINDEDNESS	Cultural -cognitive pillar. What does diversity mean within the school community?	Relational systems

complex - that's an international school.				
After a while, we realized what are we doing here? We're in the middle of [city] and they´re learning Swiss German and learning Spanish and then English is their third language and then French was their fourth and the model just didn't seem to be much use to anyone doing anything unless you happened to be Swiss German- there's no work, nothing you can do	Language	BILINGUALISM	Cultural-Cognitive pillar (The participant does not seem to understand the 'why' of the programme)	Symbolic (Language as symbolic of international nature of the school)
That's the job of the administration to assure that you are complying with the basic rules of the game. Do you comply with your AdvancEd assurances, do you comply with ministry standards?	Legal Requirements	ACCREDITATION	Regulative Pillar (monitoring and sanctioning)	Activities